

Pierce School Project
Owners Project Manager Interview Questions and Responses from Leftfield (LF)
9 July 2020

1. What other projects is/will each of you be assigned to during the project study, design and construction period of this project? What assurances can your firm provide that the proposed team will stay with the project for the duration and that they will not be overly assigned to other projects going forward? Finally, if in the opinion of the Town of Brookline that any of your staff are not the best match for the project, how would you expect that to be communicated to your firm and how would you address it?

Response:

J. Rogers recapped the slide from their presentation with regards this question. He stated not necessarily does one size fit all. Each person has varied strengths that are needed at various times. LF will be dedicating the same five individuals to the Pierce project that are serving on Driscoll. It is efficient and makes sense to LF. LF has 26 staff which is as large as or larger than their competitors. As to changes, ask J. Rogers and LF will comply.

2. This project may require occupancy or partial occupancy during construction and/or relocation of students off site? What is your experience with this including, safety, logistics, budget, scheduling and implementing of same?

Response:

At a project in Wachusett, modular buildings were used including some that were two stories. They were assembled, dismantled and relocated about the site as needed. In this way they were able to move students in and out as needed. The facility remained fully occupied and functional. LF assigned extra staff. These types of projects require a lot of coordination and planning.

3. Describe your firm's experience with fossil free/sustainable projects and how specifically can your firm be helpful with regards it?

Response:

LF has done a number of sustainable projects including Harvard University which achieved LEED platinum. The Salem State Garage project was awarded sustainable by the green design board.

J. Faxon and C. Montanez are the LF MEP experts. LF has lots of experience with high efficiency equipment and design. L. Stapleton mentioned one project that is net zero design. Driscoll School is their first fossil free school and they are learning from it. As far as tight sites such as Pierce School, East Somerville is similar. There they use wind turbines and PV arrays. If not enough space for geothermal, Pierce might consider all electric.

4. MSBA projects require participation by MBE/WBE firms by the contractor and others. What are the challenges to this and how specifically can your firm be helpful in our project meeting or exceeding with these expectations?

Response:

It's been LF experience that all projects meet the goals when it comes to designer contracts. It's more difficult with construction contracts because such a large percentage of the work is trade contractors (filed sub bidders). Bigger projects have more opportunity to meet diversity requirement, for example material suppliers.

5. What efforts has your firm made and what successes have you had, to ensure equal employment opportunities in your firm and to increase the diversity of your staff?

Response:

LF recapped the slide from their presentation part of the interview. LF has always tried to be an EEO employer and they feel the statistics of their firm lend that credence. Another goal is to help staff on their path to citizenship, where applicable.

6. In your role as a public sector OPM, please share the worst and best experience both your firm and an Owner had on a project. In the case of the worst, what was learned that you can apply to avoid a similar scenario with our project?

Response:

The best and worst is the Driscoll School. After the Town of Brookline vote for funding and the project moved to Design Development, the project got off to a rough start with communication and personality issues. LF had some difficulty understanding how Brookline works. But all parties stayed with it and found a good way forward. It's their experience that all projects have their challenges.

7. Describe how your firm will maximize the efforts of the independent Commissioning agent before and during construction and at the time of commissioning itself. Commissioning, especially of complex systems such as temperature controls can be very challenging, share some specific examples of how your firm will manage it.

Response:

J. Faxon stated he is heavily involved in commissioning. Among the things he tries to do is learn the sequence of operations as best he can as he relies on experience gained over the years. He is familiar with DDC controls. He oversees commissioning and training. He encourages the Commissioning Agent to get out into the field and get directly involved. The Durfee School is a recent project in which J. Faxon has been deeply involved.

Pierce School Project
Owners Project Manager Interview Questions and Responses from Hill International (Hill)
9 July 2020

1. What other projects is/will each of you be assigned to during the project study, design and construction period of this project? What assurances can your firm provide that the proposed team will stay with the project for the duration and that they will not be overly assigned to other projects going forward? Finally, if in the opinion of the Town of Brookline that any of your staff are not the best match for the project, how would you expect that to be communicated to your firm and how would you address it?

Response:

V. Varbedian is the propose project director and she will make sure the Hill team has all the resources they need. She is currently working with the Town of Swampscott on feasibility and schematics for a new elementary school project. She is also working together with M. Mahoney in Watertown and on the Weymouth Library project. A. Crowley is working on projects in Weymouth as well at about 30% of his time. If the Town of Brookline has a staff issue they should contact V. Varbedian and determine the best way forward.

2. This project may require occupancy or partial occupancy during construction and/or relocation of students off site? What is your experience with this including, safety, logistics, budget, scheduling and implementing of same?

Response:

M. Mahoney and R. Boddie worked together for 20 years, including two school projects in Hingham and Abington (not with Hill), both built within 40 feet of existing schools. The Abington project included a more district-wide approach. It involved closing schools and centralizing locations into better and newer schools. Five or six schools and the central administration office were moved in a short time frame.

3. Describe your firm's experience with fossil free/sustainable projects and how specifically can your firm be helpful with regards it?

Response:

Fossil free building is coming on fast. Hill has a number of projects with this component. Developing a program that is fossil free is challenging and costly. It starts with understanding the needs of the community and the budget. Hill worked with the Brookline Housing Authority to get them "greener" with their heating approach. A net zero project in Lexington is currently on hold. Congested areas have space limitations and every site is unique. For Pierce, this aspect would need to be tailored to the project and consider budget limitations. For tight urban sites, PV solar panels may not be best due to the economics of it. Geothermal would also present technical issues. Any solution would need to include other things such as lighting and lighting controls.

4. MSBA projects require participation by MBE/WBE firms by the contractor and others. What are the challenges to this and how specifically can your firm be helpful in our project meeting or exceeding with these expectations?

Response:

The MSBA and SDO provide some assistance. This should be included as part of designer selection together with the best experience for the Pierce project. Hill would provide outreach to both designers and contractors.

5. What efforts has your firm made and what successes have you had, to ensure equal employment opportunities in your firm and to increase the diversity of your staff?

Response:

Hill has always provided opportunities for minorities and women. As a team they push each other and help each other to expand in the industry. All individuals have different strengths and attributes and all work together. The different Hill offices collaborate between each other with diverse staffs and as a group to provide the best service to the client.

6. In your role as a public sector OPM, please share the worst and best experience both your firm and an Owner had on a project. In the case of the worst, what was learned that you can apply to avoid a similar scenario with our project?

Response:

M. Mahoney talked about the Hingham High School project which included adding a very large STEM addition and a renovated 1960s era wing. There was a constant struggle to maintain safe passage of students in areas adjacent to construction to get to cafeteria and other public spaces. In one of the phases related to the library and home economics area, a huge choke point was inadvertently created for the passage of students. The solution included having the contractors staff move out of the way during the change of classroom periods. This is an example of working with the school and contractor to find a solution. The lesson learned is to be willing to adapt and work as a team and to think of potential issues not from just a design or construction standpoint. The project completed on time and on budget. In response to a question about BHS insights, Hill noted the proposed team for Pierce is not the same as BHS. Need to include all stakeholders including the public and to know the project costs up front.

7. Describe how your firm will maximize the efforts of the independent Commissioning agent before and during construction and at the time of commissioning itself. Commissioning, especially of complex systems such as temperature controls can be very challenging, share some specific examples of how your firm will manage it.

Response:

Commissioning starts on day one and need a Commissioning Agent (CA) on board to work with the designer and to effectively plan. Need to understand the role of the CA and the subcontractors and communicate same to them. Temperature controls and the sequence of operations should not go to just the lowest bidder. Make sure the CA observes the “functional checklist” and include it as part of the Schedule of Values. Be sure the performance specs capture the requirements of complex systems such as lighting controls.

Pierce School Project
Owners Project Manager Interview Questions and Responses from Dore + Whittier (DW)
8 July 2020

1. What other projects is/will each of you be assigned to during the project study, design and construction period of this project? What assurances can your firm provide that the proposed team will stay with the project for the duration and that they will not be overly assigned to other projects going forward? Finally, if in the opinion of the Town of Brookline that any of your staff are not the best match for the project, how would you expect that to be communicated to your firm and how would you address it?

Response:

DW is involved with three MSBA projects that will soon be complete, so the firm is eager for new work. Welch Elementary School in Peabody is in designer selection. Maria Hastings School is in close-out. Manchester Memorial Elementary School is planned for completion in 2021. DW has a staff of 60, most of whom live in the greater Boston area. Considering the design side of the firm with the OPM side, DW has a lot of resources. If there are any issues with any staff person, the Town's concerns should be communicated directly to M. Burton.

2. This project may require occupancy or partial occupancy during construction and/or relocation of students off site? What is your experience with this including, safety, logistics, budget, scheduling and implementing of same?

Response:

It is assumed the Old Lincoln School will be used as a swing space. That being stated, it does not appear to have the capacity for all operations. There will need to be another supplemental opportunity for swing space or possibly phased construction. As examples, the Manchester school is on a small site with phased construction within feet of the existing building. As far as experience working in tight urban areas like Pierce, M. Burton noted that in his experience with Turner most of his work was in downtown Boston. Some examples are MIT, a high rise near MGH, Genzyme in Allston. T, Hartford noted he has worked on many power plant projects in urban areas. DW will look at options for temporary measures.

3. Describe your firm's experience with fossil free/sustainable projects and how specifically can your firm be helpful with regards it?

Response:

DW expects the Pierce project will be LEED silver at a minimum. The Maria Hastings School in Town of Lexington is an all-electric net zero project to be completed this September. DW will share "lessons learned". The Pierce School has challenges for net zero partly because the site is small which limits geothermal opportunities. Consider placing the wells under the building, energy efficient windows and other measures. For example, the Hastings school has rooftop solar, community solar.

4. MSBA projects require participation by MBE/WBE firms by the contractor and others. What are the challenges to this and how specifically can your firm be helpful in our project meeting or exceeding with these expectations?

Response:

DW noted the revised participation goals as recently issued by the Commonwealth's SDO office increasing design WBE/MBE goals from 17.9% to 21% and construction from 10.4% to about 12%. DW will work with the designer and contractor on meeting the goals, and they have experience with firms that can meet and exceed them. As far as outreach is concerned, DW will personally reach out to firms they know can provide MBE participation.

5. What efforts has your firm made and what successes have you had, to ensure equal employment opportunities in your firm and to increase the diversity of your staff?

Response:

DW recapped the slide from their presentation with respect to this question. Their staff is 35% women and they acknowledge they are not where they would like to be with respect to minority employment. To address this they are working on internships and co-ops with students both on the design and project management sides of the firm.

6. In your role as a public sector OPM, please share the worst and best experience both your firm and an Owner had on a project. In the case of the worst, what was learned that you can apply to avoid a similar scenario with our project?

Response:

The Maria Hastings School has been a very fun project to work on. There is an effective project team with both a great architect and CM@R firm. They lost time on the schedule owing to site work issues, but they were able to recover and finish on time. M. Burton stated he could not think of a bad experience with DW. Back when he was with Turner as OPM on the Newton South High School project in 1999, the general contractor went out of business at 60% construction. The remaining team had to figure out how to complete the project and succeeded in getting it done on time.

7. Describe how your firm will maximize the efforts of the independent Commissioning agent before and during construction and at the time of commissioning itself. Commissioning, especially of complex systems such as temperature controls can be very challenging, share some specific examples of how your firm will manage it.

Response:

T. Hartford noted the MSBA requires a commissioning agent (CA). The CA works with the entire team to ensure what is procured and installed is per plans and specs. Recent experiences includes a 300K sf vocational school. There will be issues with systems such as lighting and HVAC and commissioning is a constant and continual process. It is important to get a good CA firm. M. Burton stated the biggest potential failure points are with advanced technology systems. DW will work with the design team to require lots of training for staff.

M. Burton then offered some brief closing remarks to the effect that DW would really like the Pierce project, K-12 schools is all they do, they have knowledge from both the design and OPM perspective, they understand codes and have developed customized tools for the MSBA process.

Pierce School Project
Owners Project Manager Interview Questions and Responses from CHA
8 July 2020

1. What other projects is/will each of you be assigned to during the project study, design and construction period of this project? What assurances can your firm provide that the proposed team will stay with the project for the duration and that they will not be overly assigned to other projects going forward? Finally, if in the opinion of the Town of Brookline that any of your staff are not the best match for the project, how would you expect that to be communicated to your firm and how would you address it?

Response:

R. Marks is currently assigned to a project in Westport which he has been on for 15 months. He and T. Walton are both working on an elementary school in Randolph, which is nearing completion. M. McNulty is working on a library in Sherborn and a charter school in Lowell. D. Richardson, the MEP/Commissioning staff person is working on multiple projects. The firm has 33 staff people based in Boston including seven estimators so there are a lot of resources available. If the Town of Brookline (TOB) is having any issues with a particular staff person, someone should contact R. Marks and ask them to be reassigned. As far as R. Marks time on this project, he stated it will vary from 25-30% to as much as 40-50% of his time.

2. This project may require occupancy or partial occupancy during construction and/or relocation of students off site? What is your experience with this including, safety, logistics, budget, scheduling and implementing of same?

Response:

Old Lincoln School will be the swing space. To do a project of this size the children need to be off site. There may need to be another location to house students as well. M. McNulty comes from a background with Suffolk Construction . An example of his experience with this is a summer project at MIT. Other CHA examples include Belmont High School, at 400K sf facility built adjacent to an occupied school, and two projects in the Town of Lincoln with Consigli Construction.

3. Describe your firm's experience with fossil free/sustainable projects and how specifically can your firm be helpful with regards it?

Response:

Belmont High School has 300 geothermal wells at 300' deep, with a full time inspector observing development of three wells per day. In the Town of Lincoln, PV systems are being installed on roof at no capital cost to the town. In a follow up question, specifically to the Pierce School project, CHA responded there may be opportunities for some geothermal wells, under the building for example. Other potential sources of energy would be off-site energy or on site PV arrays, likely to be a combination of sources. Wind energy is not likely applicable to the Pierce project.

4. MSBA projects require participation by MBE/WBE firms by the contractor and others. What are the challenges to this and how specifically can your firm be helpful in our project meeting or exceeding with these expectations?

Response:

R. Marks stated he has been engaged with this for 40 years. Strategies involve meeting with the contractor/CM@R and instruct as to the importance of this issue, verify and work hard to ensure compliance. M. McNulty indicated he was part of the diversity and inclusion group at Suffolk. The challenges include a limited pool of MBE subcontractors; General Air is one example of a MBE firm. T. Walton noted the difficulty in New Bedford in meeting workforce requirements. One strategy that may help is to break up scope of work in non-trade contractors where applicable.

5. What efforts has your firm made and what successes have you had, to ensure equal employment opportunities in your firm and to increase the diversity of your staff?

Response:

CHA is passionate about this, with a 33 person Boston office, 10 of whom are not majority, believe in the “melting pot”. The seven estimators are from seven different countries. A fifteen year long term employee is African American and three of six project managers are female.

6. In your role as a public sector OPM, please share the worst and best experience both your firm and an Owner had on a project. In the case of the worst, what was learned that you can apply to avoid a similar scenario with our project?

Response:

The worst is the West Tisbury project. The team in that town worked for two years on the project only to have voters not approve funding. The best is when a school opens and seeing the students in the building for the first time; Dearborn is a recent example.

7. Describe how your firm will maximize the efforts of the independent Commissioning agent before and during construction and at the time of commissioning itself. Commissioning, especially of complex systems such as temperature controls can be very challenging, share some specific examples of how your firm will manage it.

Response:

Commissioning really starts in the design phase with discussions with the user agency to make sure all their goals are met including maintenance and system requirements. Next systems should be selected that can be maintained by staff. Control systems need to be designed properly and any value engineering efforts should not hinder operability of systems. CHA has on staff an electrician who is very familiar with lighting controls. Commissioning is a continuous process into the O&M and warranty phases.

R. Marks then offered some brief closing remarks to the effect that CHA can keep the project on budget, work with COVID as it is and that they would very much like to be the OPM on the John R. Pierce Project.

Meeting Minutes

Name of Committee: Pierce School Owner's Project Manager Selection Committee

Meeting Date: 8 July 2020 Time: 9:00 a.m. and 9 July 2020 Time: 2:00 p.m. Meeting Location: Zoom

Attendees: B. Greene, H. Charlupski, S. Federspiel, J. Fierman, K. Kaplan, N. Peck, M. Gillis, J. Yadoff, T. Guigli, R. Saville, representatives from CHA, Dore + Whittier, Hill International and Leftfield for their respective interviews

Next Meeting: 16 July 2020 at 1:00 p.m. via Zoom

Topic: Meeting Minutes - Meeting Minutes of 24 June 2020 unanimously approved by roll call vote after moved by H. Charlupski and seconded by S. Federspiel

Topic: Interviews

See attached notes and presentation materials of the four short-listed firm's interviews which took place as follows;

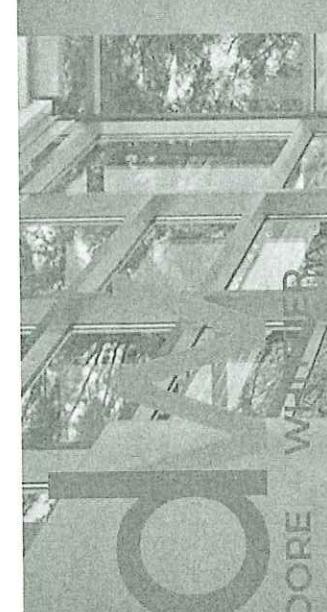
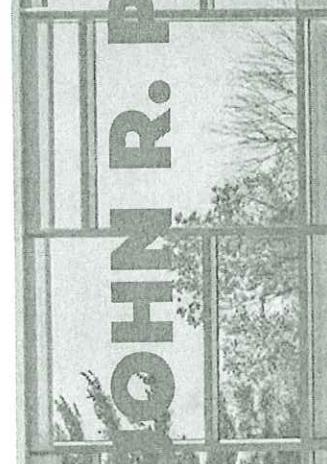
8 July 2020

9:00 a.m.	CHA
10:00	Dore + Whittier

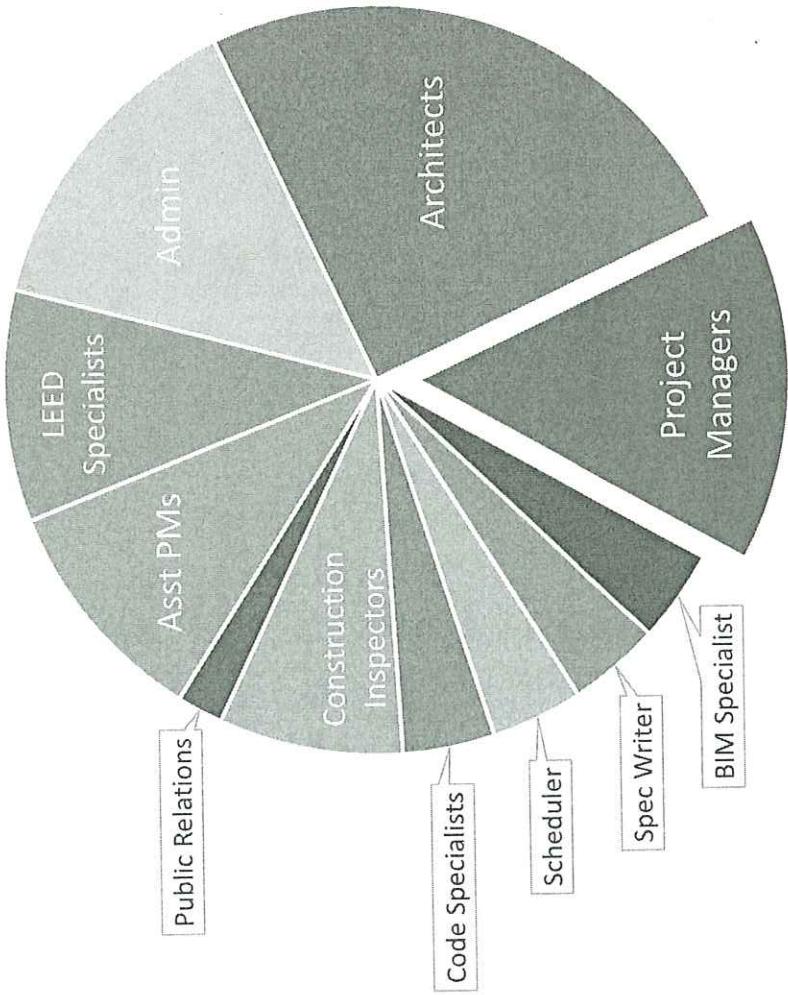
9 July 2020

2:00 p.m.	Hill International
3:00	Leftfield

Respectfully submitted,
Anthony Guigli
Project Administrator



DORE + WHITTIER



- ✓ Educational K-12 is our firm's focus
- ✓ Provide Project Management and Design expertise on Massachusetts public schools
- ✓ Deep bench with vast expertise
- ✓ Local relationships
- ✓ Successful working with the MSBA
- ✓ Detailed & knowledgeable process managers
- ✓ Team leaders & collaborators

Staffing Plan

Jon Donner



Rachel Donner



Terry Hartford



Mike Cox



Christina Shefferman



Mike Burton



On-Site Project Representative

Assistant Project Manager

On-Site Project Manager

Project Manager - Controls

Project Manager - Process

Project Director

- On-site daily activity record keeping
- Drawing & specification compliance verification
- 3rd party inspection coordinator

- Documentation & record management
- Meeting minutes
- Communication coordinator
- Assist other team members

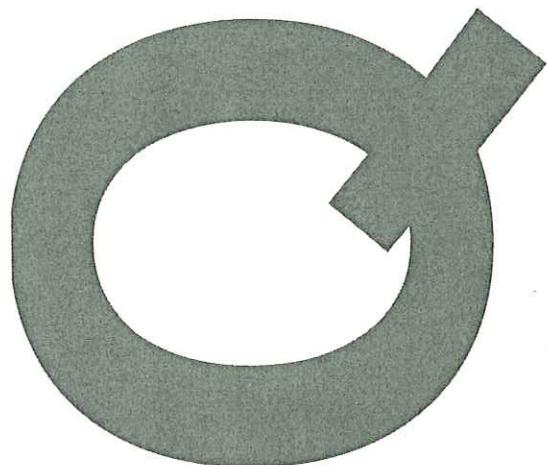
- On-site troubleshooting
- Daily communication w/Owner's team
- Transition training & turnover
- Commissioning & punch list manager

- Financial manager
- Budget & ProPay management
- Change management
- MSBA budget coordination

- MSBA process management
 - SBC leadership
 - Meeting manager & facilitator
 - Communication manager
- Partner
- 28 years of building experience
 - Team leadership
 - Net Zero experience
 - Risk management
 - Schedule & cost
 - Building oversight

— TIME COMMITTED TO THIS PROJECT —

DESIGN	40%	50%	40%	20%	60%	-	100%
CONST.	60%	50%	60%	80%	40%		



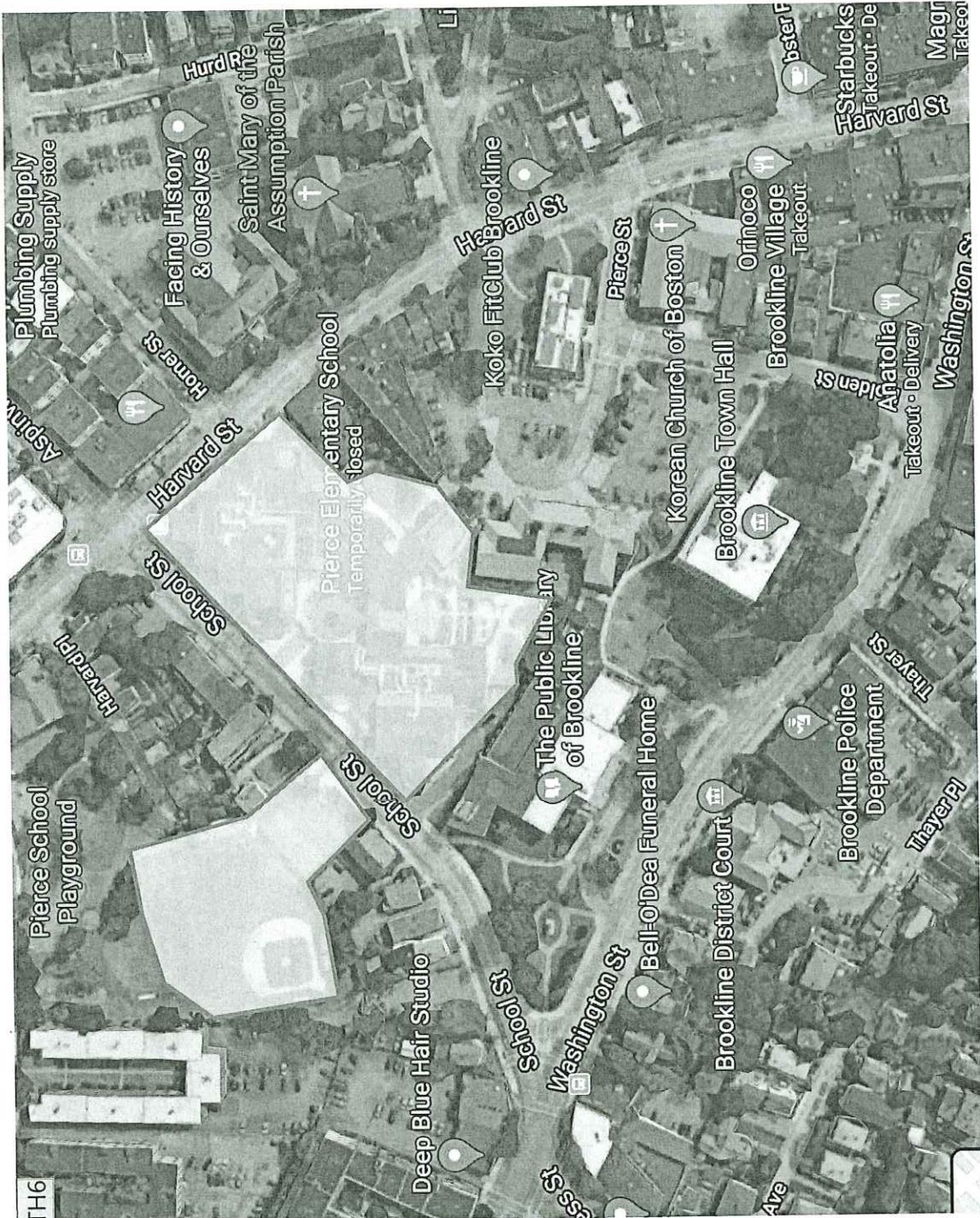
What interests your firm about the
Pierce project and what challenges do
you foresee?

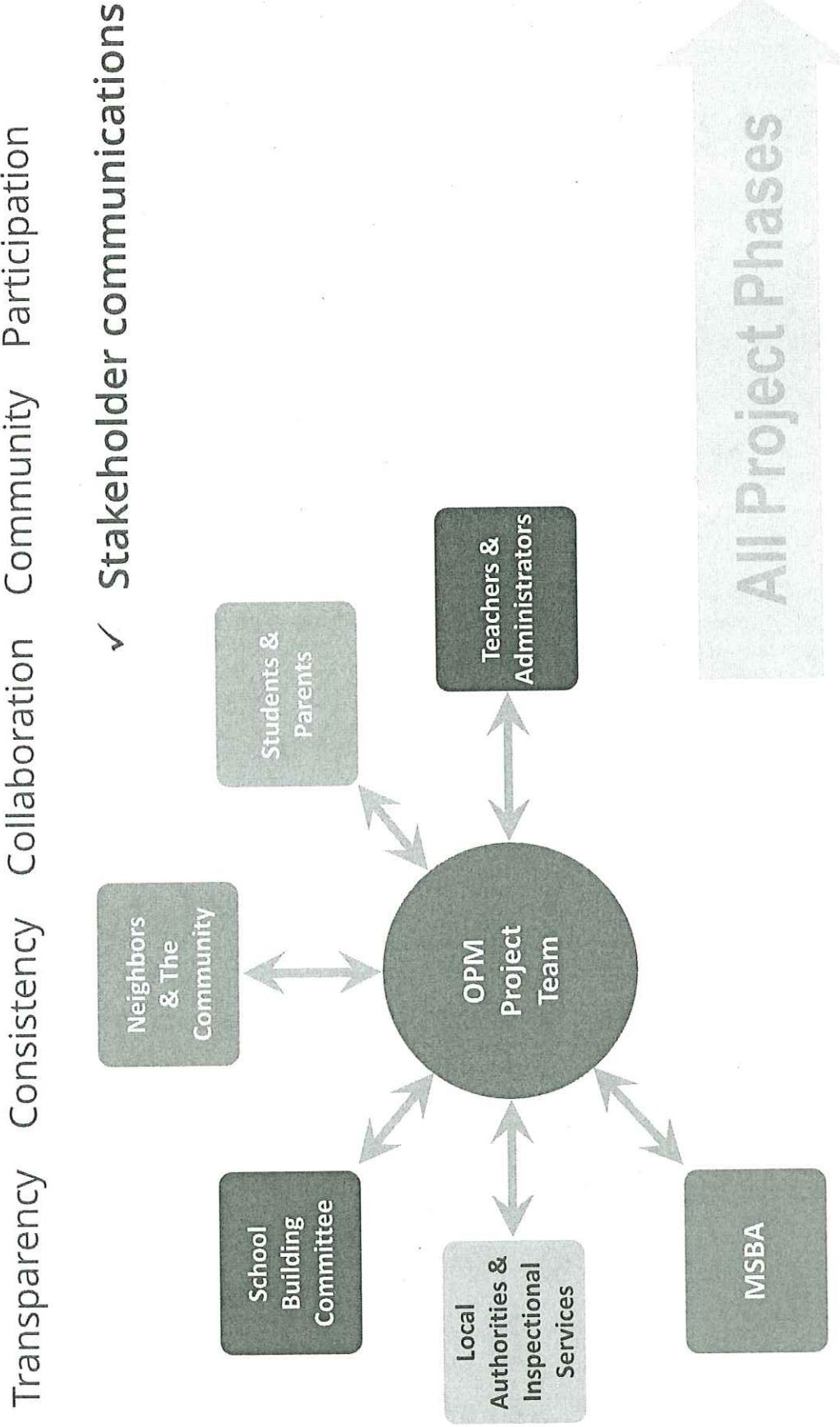


- ✓ Opportunity to create relationships with Brookline
- ✓ Opportunity to build a vehicle for students of Brookline to be successful in their studies for 50+ years
- ✓ Project aligns with our team's expertise, skillset, and capacity
- ✓ Complex site will require highest level of planning and teamwork

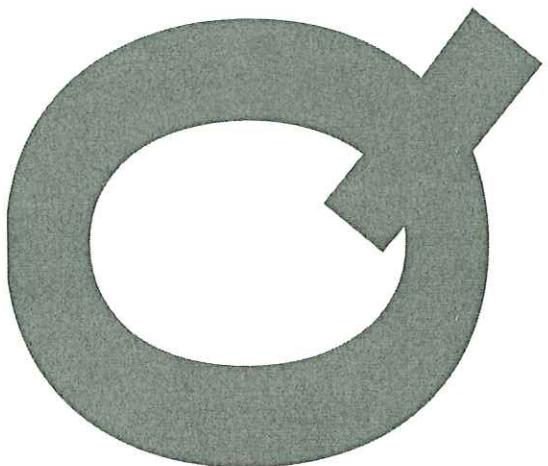
Existing Site

- ✓ Site
- ✓ Logistics
- ✓ Abutters:
 - Town Hall
 - St Mary School
 - Retail
 - Residential
 - Public Library
 - Gateway Arts
 - Benefitness Health Club
- ✓ Swing Space / Phasing





■ Discuss management of the project including budget, schedule, designer and contractor procurement (including participation of MBE/WBE firms in same).

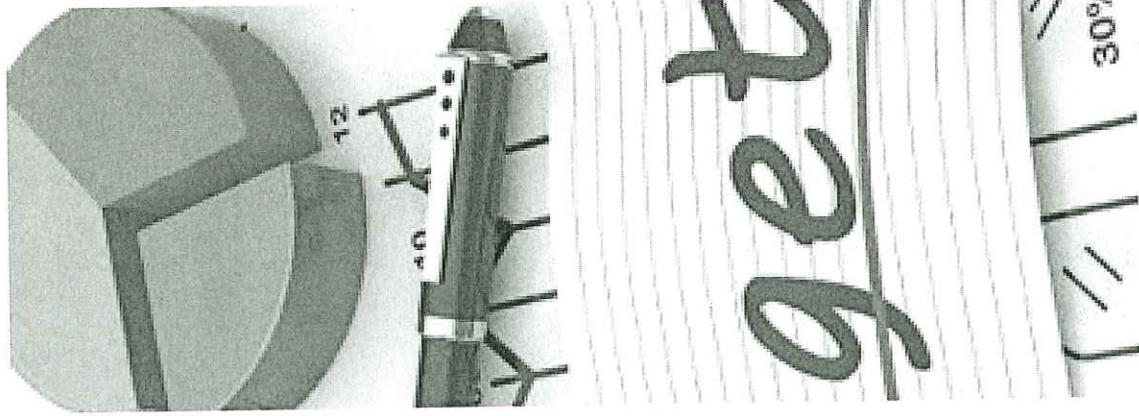


Managing Budget

- ✓ Confirm Brookline goals for program and cost. Establish realistic total project budget w/ MSBA.
- ✓ Multiple estimates during design / value engineering
- ✓ Quality bid documents / OPM design review
- ✓ Construction Manager at Risk (Ch. 149a)

Managing Budget

- ✓ MSBA ProPay budget system
 - Dashboard (D+W)
- ✓ Live audit
- ✓ Simplify monthly submissions



Managing Schedule

MAY 2022 Annual Town Meeting	2020	2021	2022	2023	2024	2025
MSBA Module	Duration in Months					
Hire OPM	4					
Select Architect	3					
Feasibility	8					
Schematic Design	8					
MSBA Board Approval of S	2					
Town Vote	1					
Design Development	7					
Construction Documents	7					
Bidding / Finalize GMP	3					
Begin Sitework / foundati	6					
Construction	23					

- ✓ Establish realistic goals from beginning
- ✓ CM-at-Risk / Early Release Packages (ERP)
- ✓ Monthly schedule review and analysis
- ✓ On-site management
- ✓ Build a successful team (capacity/skillset)

Forming the Team

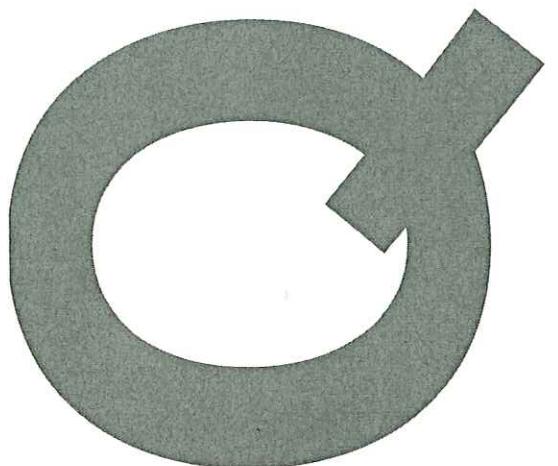
- ✓ OPM - MSBA OPM Selection Committee
- ✓ Designer - MSBA Designer Selection Panel
- ✓ CM/GC - Ch. 149 vs 149a
- ✓ Contractors (FSB/NFSB)
- ✓ Build a successful team that aligns with project vision and goals



MBE/WBE



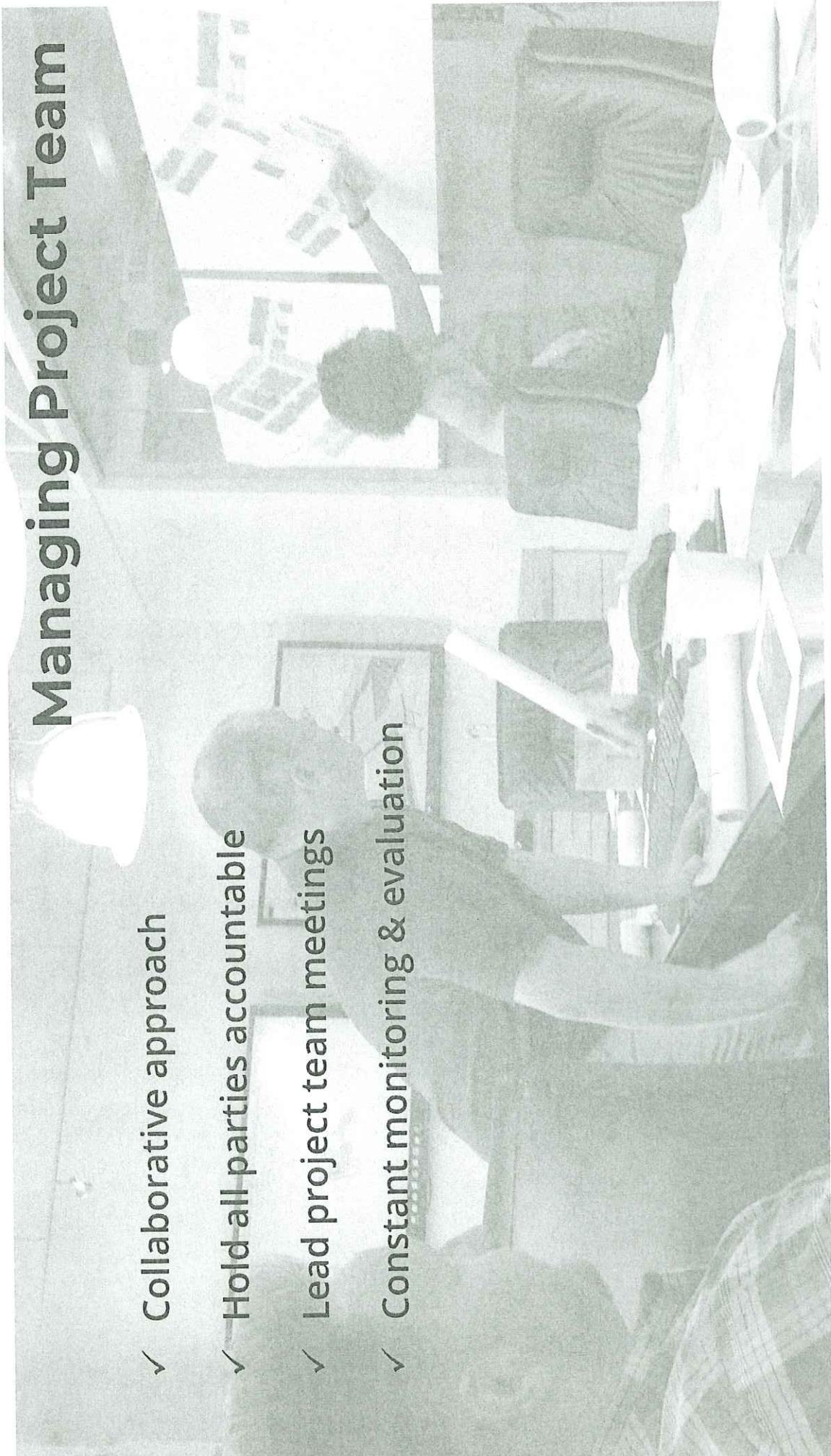
- ✓ D+W has worked with 40+ MBE/WBE firms across MA
- ✓ As of July 1, DCAMM set new MBE/WBE participation goals on state funded building projects
 - Overall Annual Program Goals for Design:
MBE - 6.6% WBE - 5%
 - Overall Annual Program Goals for Construction:
MBE - 4.2% WBE - 8.8%
Work with the GC/CM subcontractors that will help achieve the goal
 - Project specific goals developed by awarding authority on an individual project by project basis

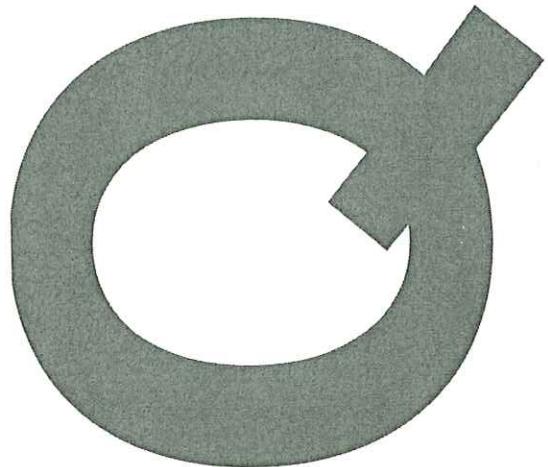


Discuss management of designer and
contractor after procurement.

Managing Project Team

- ✓ Collaborative approach
- ✓ Hold all parties accountable
- ✓ Lead project team meetings
- ✓ Constant monitoring & evaluation





■ Describe your firm's experience with
MSBA systems including a clean,
successful and timely audit at the end of
the project.

MSBA Systems

Understand all modules and requirements for MSBA submissions

✓ Monthly reporting

✓ Work hand-in-hand with MSBA project management team

✓ 3011 development (total project budget) eligible and ineligible

✓ Budget revision requests

✓ ProPay / dashboard

✓ Commissioning

✓ Closeout

D+W

Working with D+W has been a great experience.

They manage the project as if it were their own school—it is like having an extension of our staff.

They know the project inside and out and the team is on top of every detail.

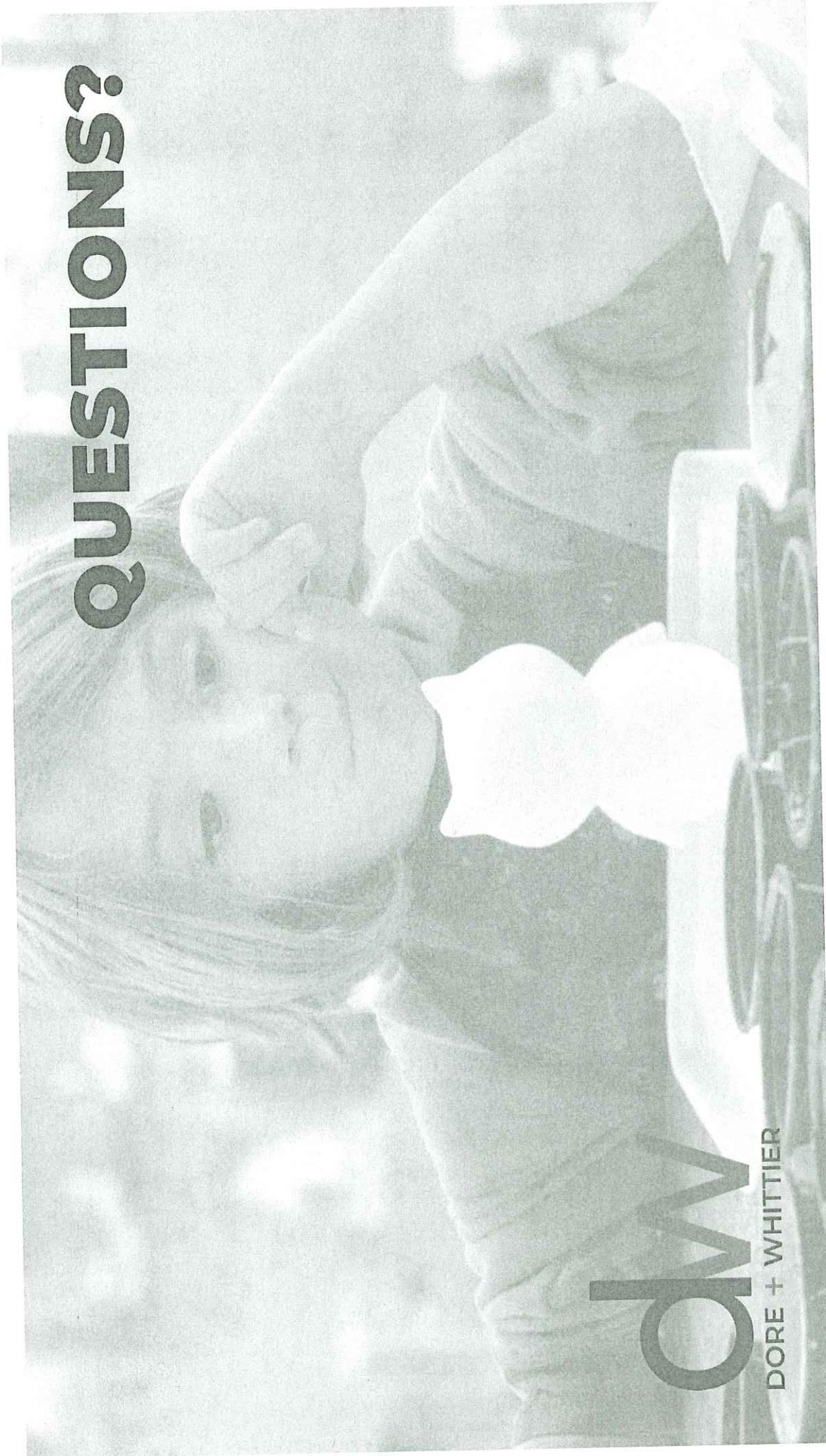
They are collaborative in their process and do a great job keeping a large committee informed and working efficiently.

The combination of collaboration and decisive decision-making set them apart from other Project Managers.

Our complicated project on a very tight site is on time and on budget!

—Pam Beaudoin, Superintendent, Manchester Essex Regional School District

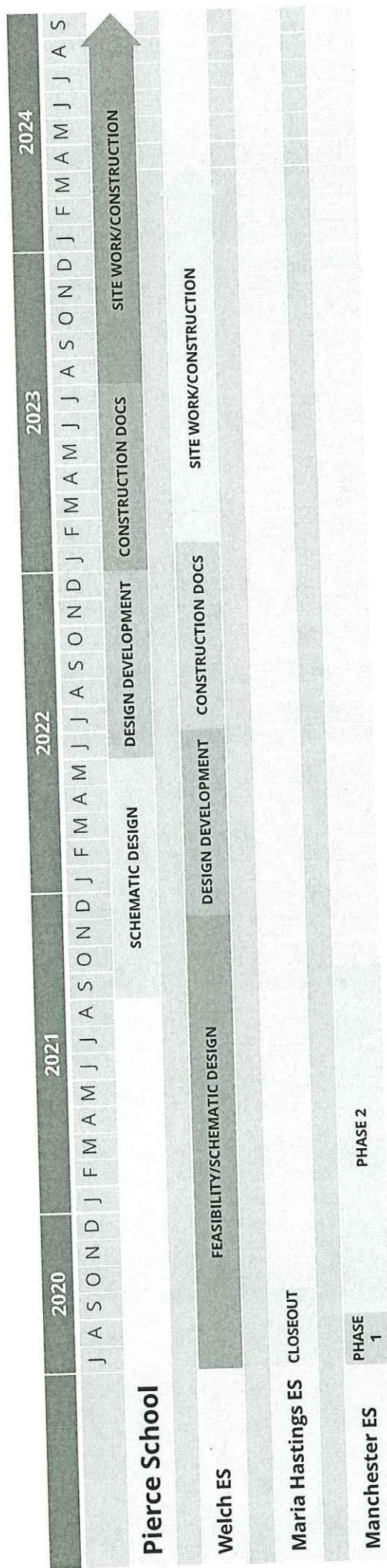
JJ



QUESTIONS?

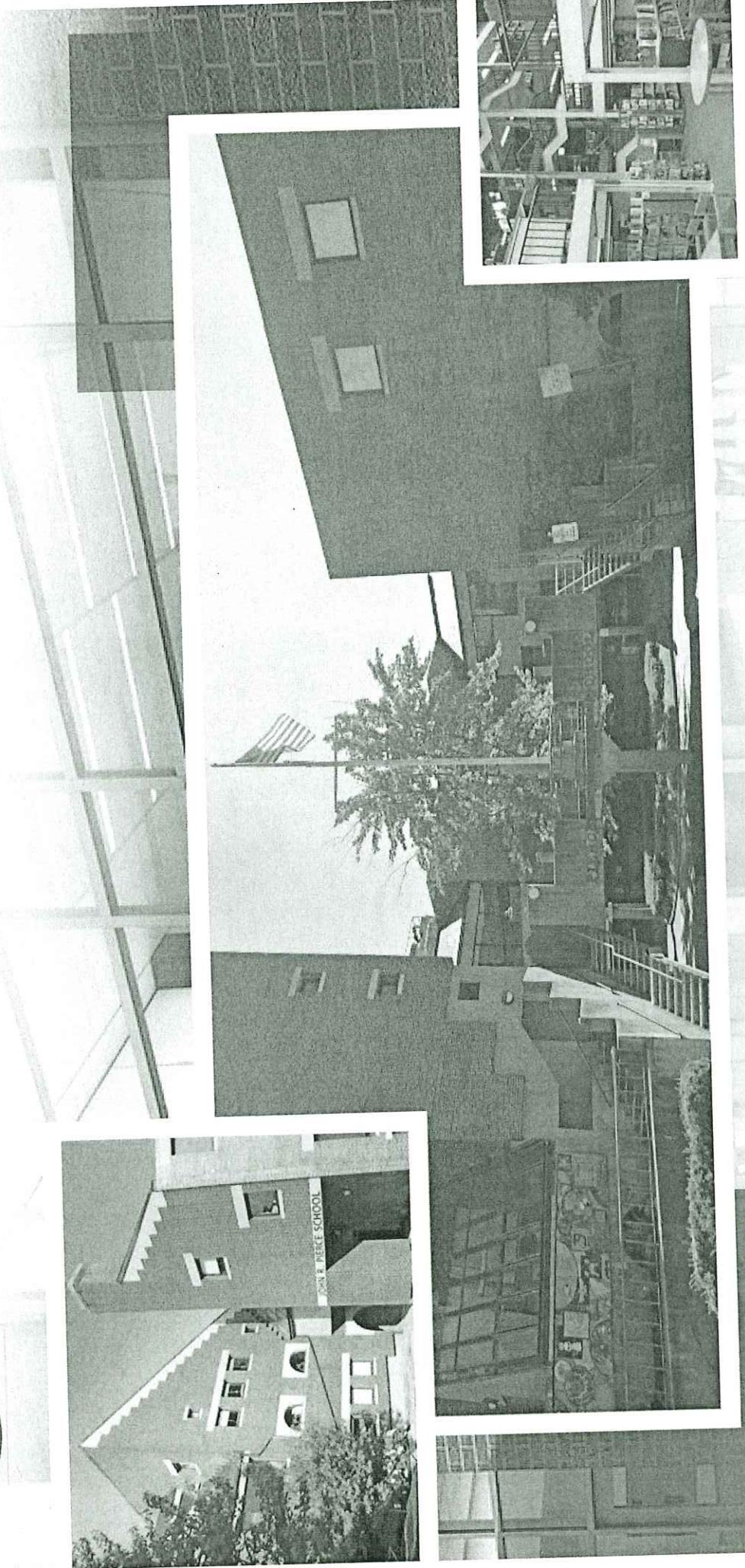
QWV
DORE + WHITTIER

Current Projects



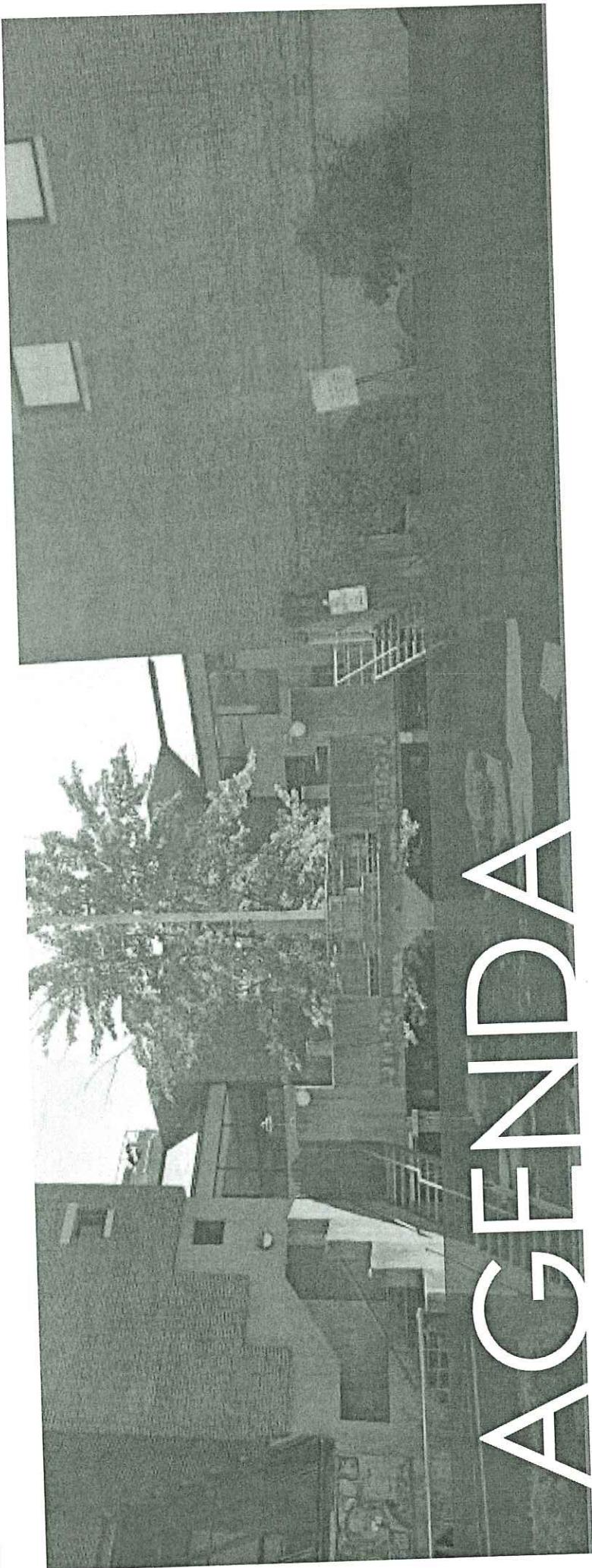


TOWN OF BROOKLINE
OWNER'S PROJECT MANAGER SERVICES
FOR THE PIERCE SCHOOL
JULY 9, 2020 | PRESENTATION



HILL

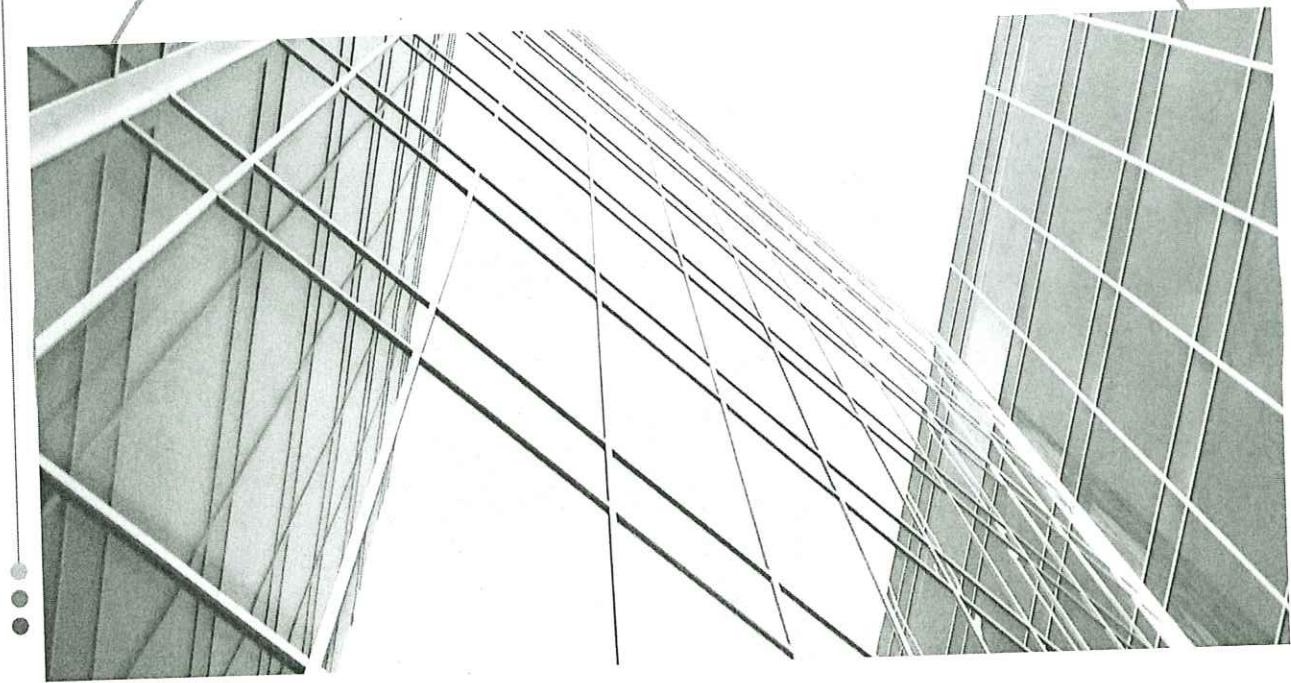
Hill International



AGENDA

- WHO WE ARE
- YOUR PROJECT TEAM
- PROJECT UNDERSTANDING
- MSBA EXPERIENCE
- MANAGEMENT APPROACH
- MEP / COMMISSIONING
- SUSTAINABILITY
- QUESTIONS & ANSWERS

Who We Are – Hill International Inc.



Worldwide Leader in:

- Project Management Services
- Construction Management Services
- Construction Estimating Services
- Construction Scheduling Services
- Owner's Representative Services

**Founded in 1976. Headquartered
in Philadelphia, PA**

2,700 Professionals in
50 Offices Worldwide

**Massachusetts Presence since 1996
(Became Hill in 2013) Needham, MA**

Managed More than \$1 Billion in
Public Projects in Massachusetts

39 Professionals Cover New England

Your Project Team



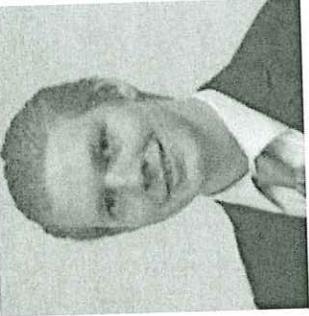
Vivian Varbedian, MCPPO | Project Director

Vivian has successfully managed several MSBA Grant funded projects throughout the Commonwealth. Her strength lies in her ability to manage the team, the complexities of the project, and the expectations of the town, design team, and contractor.



Mary Mahoney, MCPPO | Project Manager

Mary has over 33 years of experience providing project management and owner's representative services, and has successfully managed several MSBA Grant funded projects throughout the Commonwealth.



Alex Crowley | Assistant Project Manager

Alex has worked well with Mary and Roger on several similar projects and his expertise includes helping clients meet reporting needs, tracking budgets and schedules, leading technical meetings, and assessing worksite conditions.



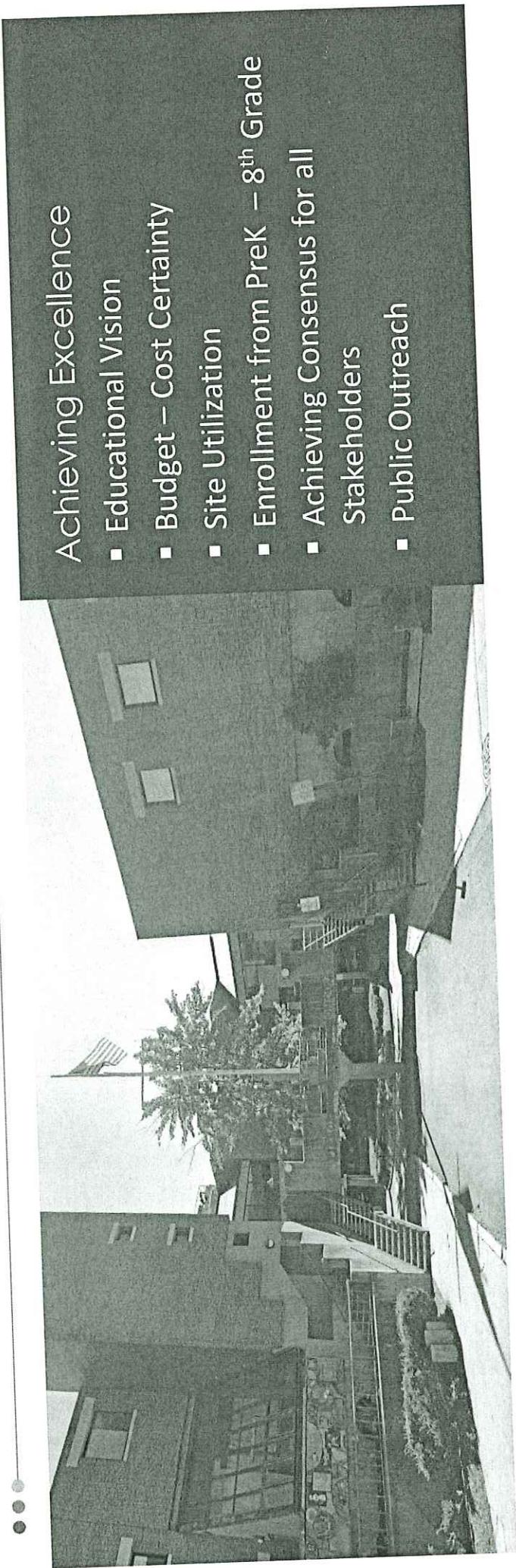
Richard "Rick" Anderson, MCPPO | MEP

Rick Anderson has more than 35 years of project management experience in the planning, pre-construction, procurement, design, construction administration/owner's representation, commissioning, and delivery of a wide variety of projects.

Your Project Team

Role	Primary Contact	Approximate % Time	Other Notes
Feasibility Study & Schematic Design	Vivian Varbedian, MCPPPO	Approximately 20%; as needed	
Design Development	Mary Mahoney, MCPPPO	Approximately 50%	
Construction Documents	Alex Crowley	Approximately 30%	
Construction & Closeout	Rick Anderson, MCPPPO	MEP Subject Matter Expert - As Needed	Full Time
	Roger Boddie		

Project Understanding



Achieving Excellence

- Educational Vision
- Budget – Cost Certainty
- Site Utilization
- Enrollment from PreK – 8th Grade
- Achieving Consensus for all Stakeholders
- Public Outreach

Challenges We Foresee:

- The District's mission to accommodate its growing population in a singular location.
- Maximum utilization of existing site – Town of Brookline wishes to examine expanding in place options. Will Need to study the efficient use of the existing 198,000 gross square feet area.
- The addition of the prekindergarten population to the John R. Pierce School. The current enrollment of 842 students is expected to increase to 958 students by 2022 then around 940 students from 2023 through 2027.
- Achieving consensus with all the stakeholders throughout the process

Project Understanding

Achieving Consensus

Our Style...

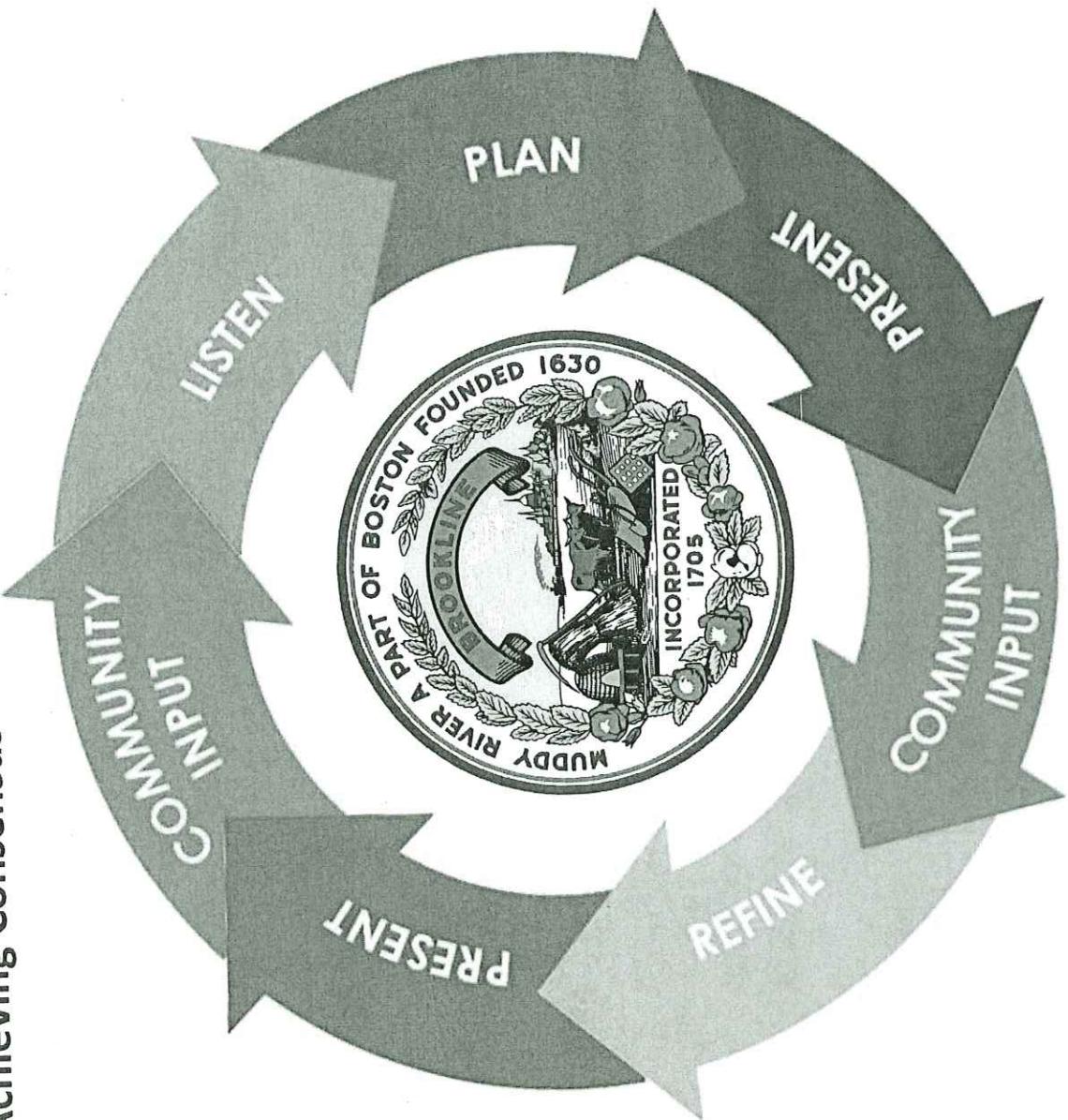
We are skilled Facilitators

We will be Present

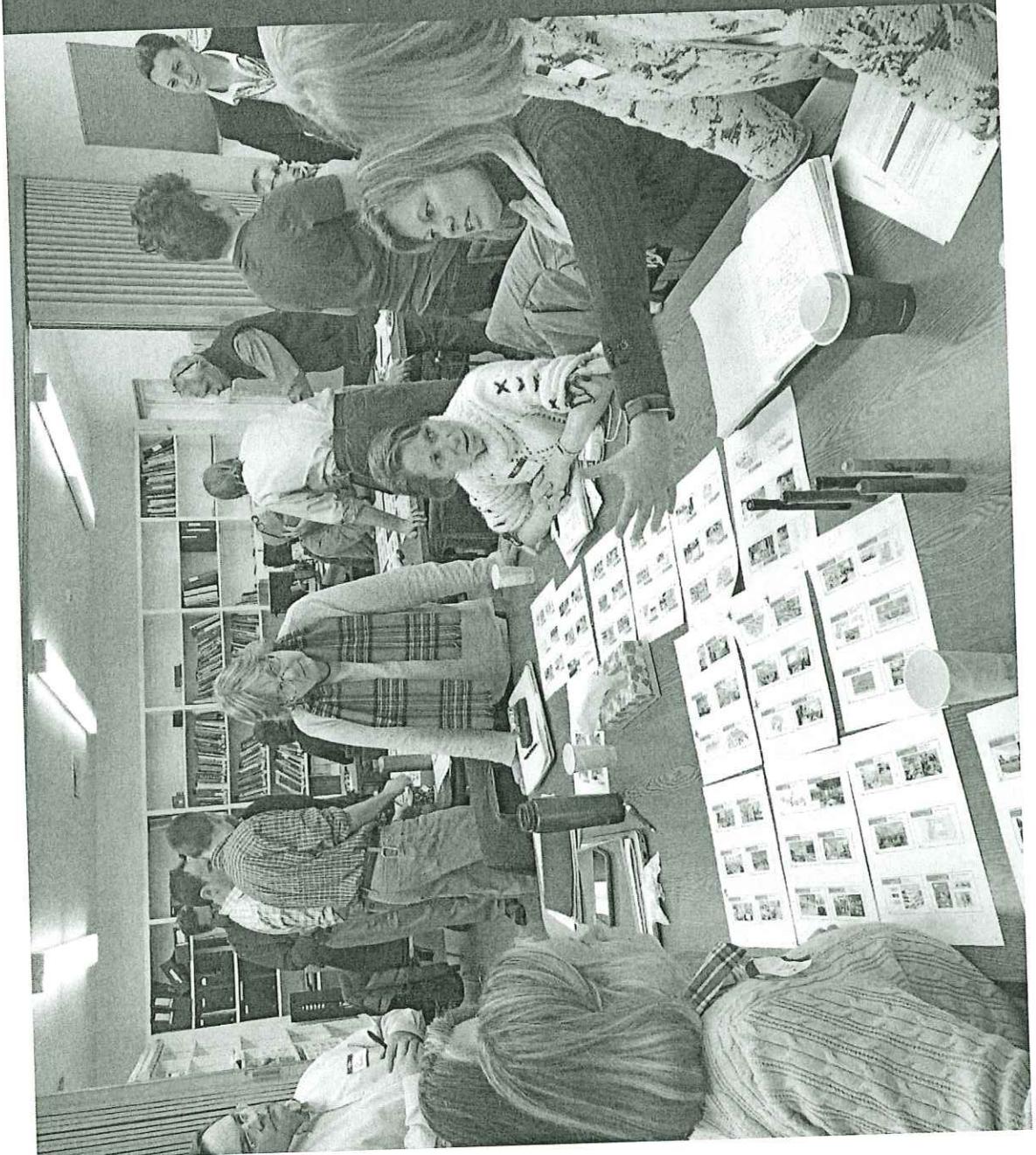
Engage the Community
and the various Stakeholders

Listen to Everyone

Pay attention to
"The Little Things"



Project Understanding



COMMUNICATION



Stakeholder Groups

Future Focused

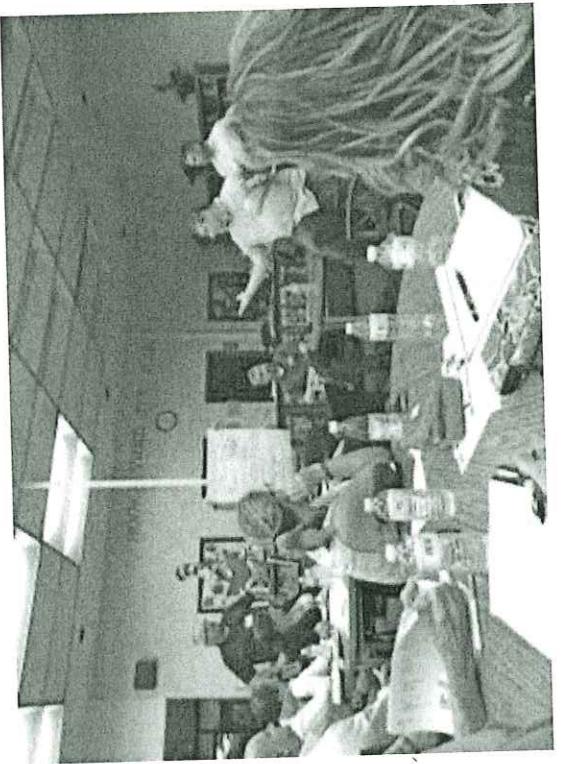
Design Patterns

Guiding the Process

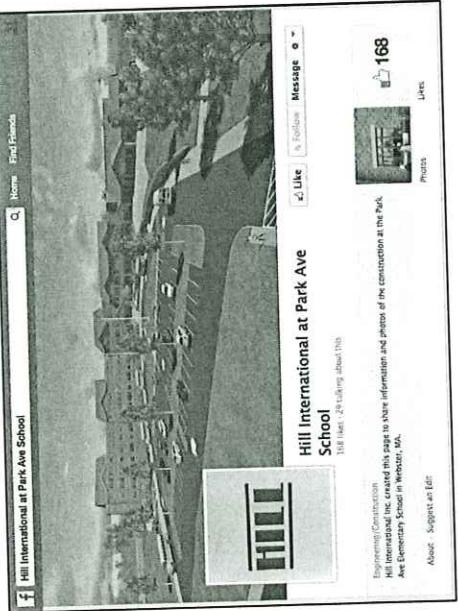
Project Understanding



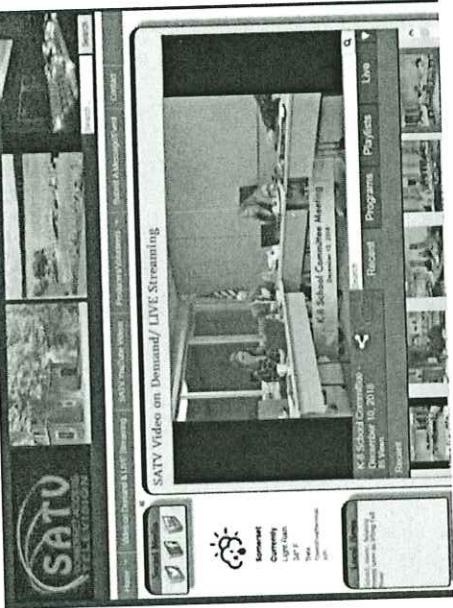
Develop a plan for to communicate to All the Stakeholders and Execute



Website / Social Media



Local Media



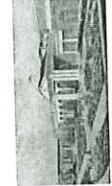
Public Forums



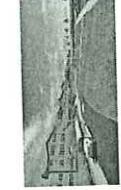
MSBA Experience



East Bridgewater High School
\$76 million
New grade 7-12 Model School



Park Ave. Elementary School,
Webster, MA
\$47 million – new construction



Paul Revere School
\$17.4 million, 50,000 sf new
elementary school



Jonas Clarke Middle School
\$22 million – Middle School
Renovation and Addition



Maria Weston Chapman MS,
Weymouth
\$164.2M, 252,000 new and renovation,
1470 students



Rumney Marsh Academy Revere
\$32.6 million New 95,000 sf
middle school for 564 students



**Middleton Howe Manning
New Elementary School**
\$35 million New 83,000 sf school for
553 students - CHPS



New Everett High School
\$82 million
325,000 sf building



Town of Natick, High School
\$89 million - New high school



**Medford Public School Ph 2
Roberts Elementary School**
\$16 million Elementary school
for 604 students

Town of Dracut
\$60 million
High School Add/Renovation



South Middle School, Braintree
\$80M, New construction

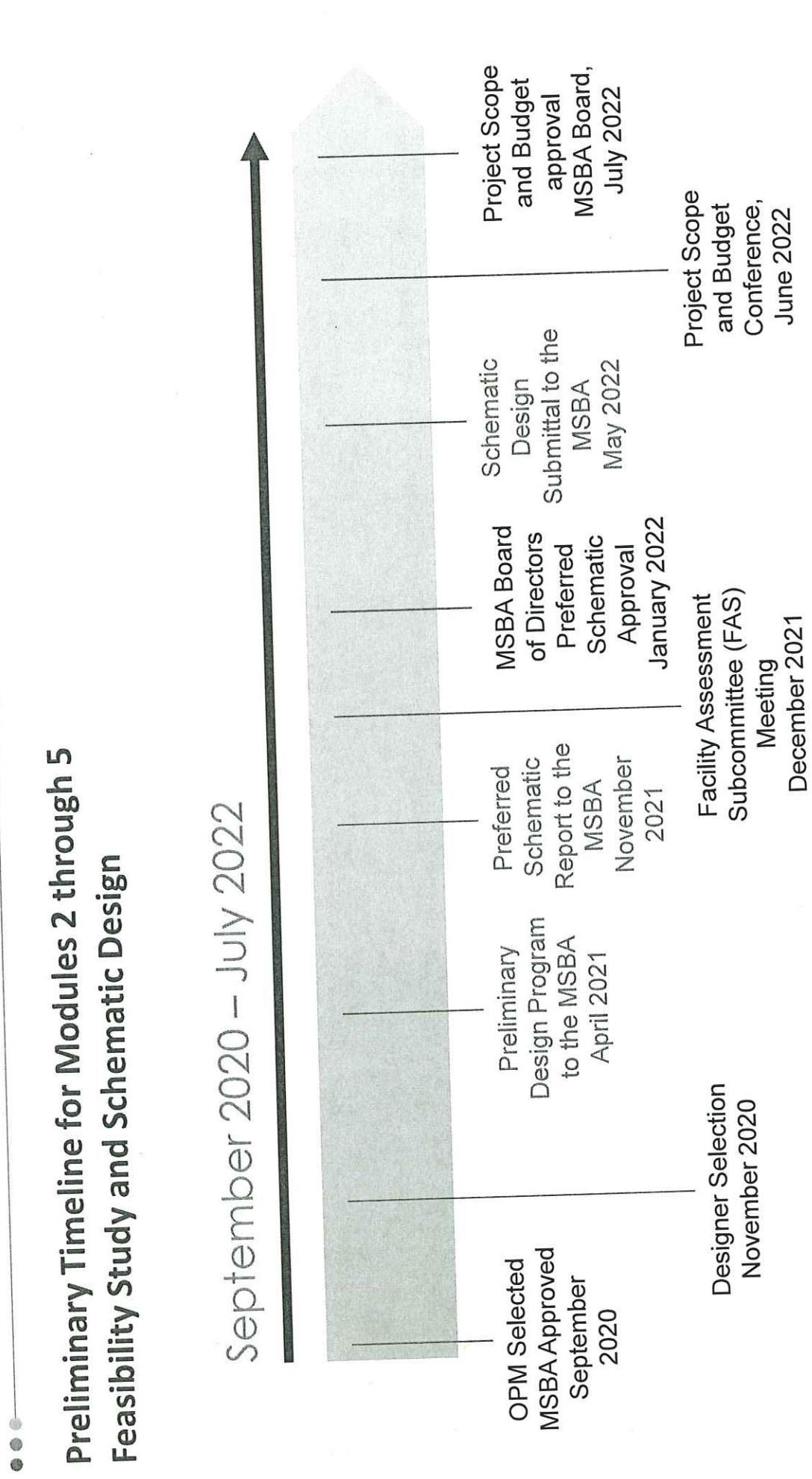


Town of Braintree East Middle School
\$83 million, 1,128 student renovation



**Estabrook Elementary School (CM at Risk
project), Lexington, MA**
\$41 million - new 90,000 SF
Elementary School

MSBA Experience



MSBA Experience

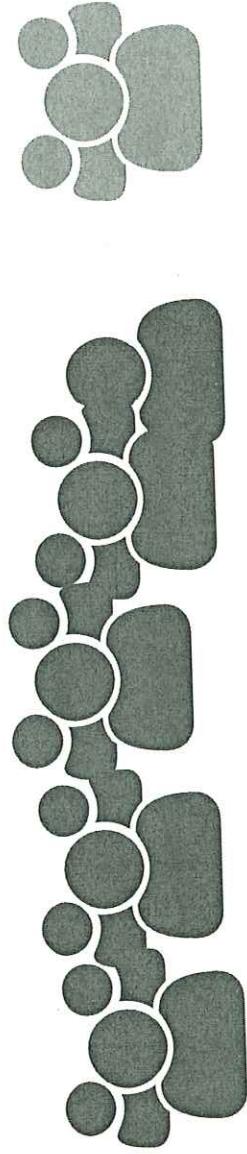
•••

Key items to include in the RFQ for Designer Selection:

1. Education Planning and Potential Grade Re-configuration
2. District wide review of overall facilities needs and enrollment increases.
3. Explore alternate site locations and site logistics.
4. Design for Team Teaching and Student Staff collaboration.
5. Design to include fine arts performing arts programs.
6. Look at both renovation and new construction options.
7. Address Special needs and ELL learning requirements.
8. Address MA CHPS or LEED Certification and MSBA Green School Incentives
9. Project Delivery Method Hard Bid Chapter 149 or CM @ Risk Chapter 149a
10. Understanding of MA-DOER "Green Community" designation and principles of climatic action change"

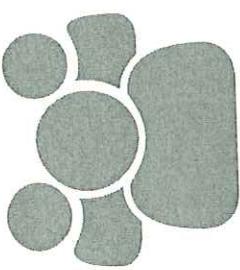
MSBA Experience

- MSBA's Designer Selection Panel is made up of 13 appointed members and three representatives of the District



- The three members who are representatives of the District includes:

- one member designated by the school committee;
- the superintendent of schools or his/her designee;
- the chief executive officer of the city or town or his/her designee



MSBA Experience



Project Development



Meetings

Public Facilities Department

Public Visioning Sessions

School Department

School Staff and Teachers

City Departments

Public Safety

Town Committees/Boards/Commissions



Surveys

Existing Conditions Analysis

Geo-technical and

Environmental Investigations

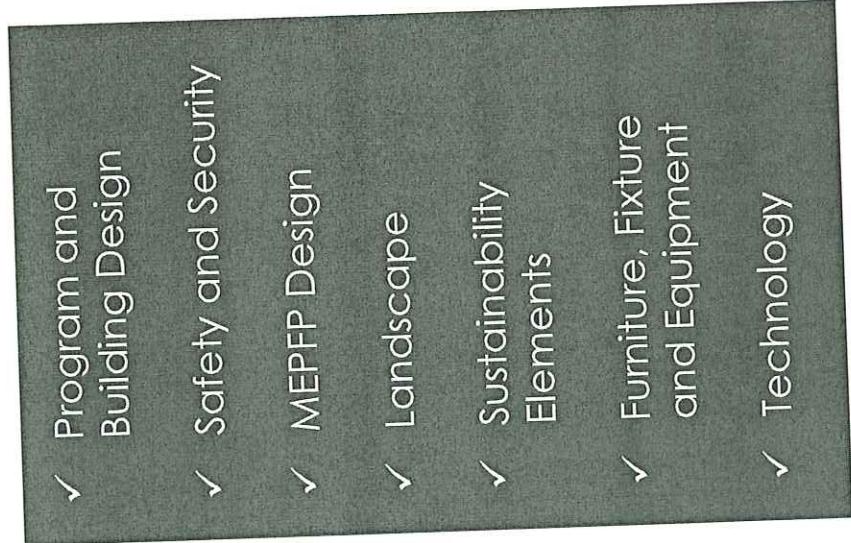
Site Survey

Traffic Study

Energy Model

Life Cycle Analysis

Climate Action Analysis



MSBA Experience

How do you guide a Building Committee through
the decision of Design/Bid/Build vs. CM-at-Risk?

Chapter 149

*All risk factors need to be addressed prior to
filled sub-bid process without input of GC*

- ✓ Lowest price on bid day
- ✓ Traditional delivery system
- ✓ Tight Documents are essential
- ✓ Variation from bid day plan can result in exposure to cost and schedule risk

Chapter 149A

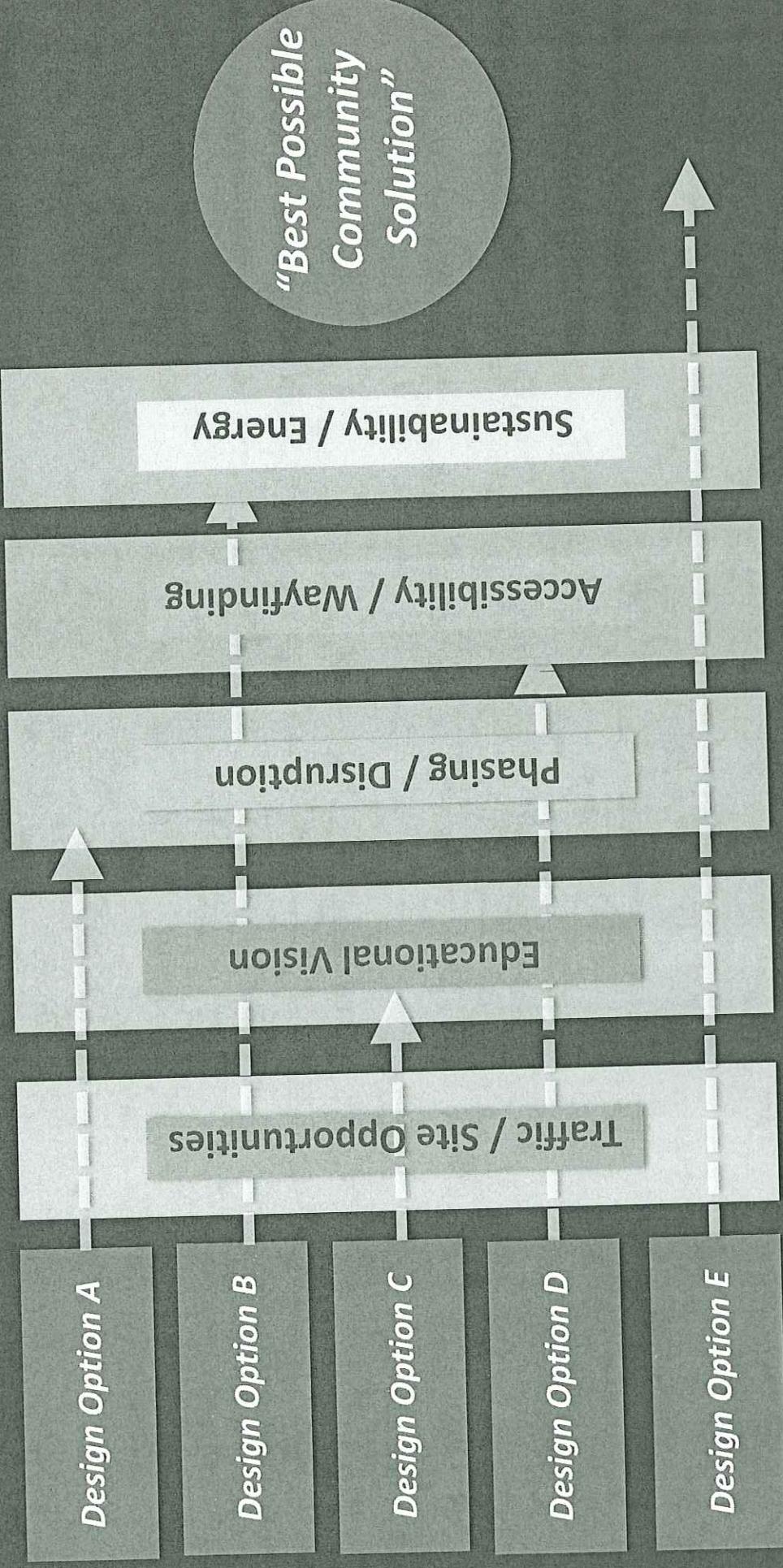
*CM engaged in pre-construction process to
address risk factors prior to issuing trade and
non-trade bid packages*

- ✓ CM can be engaged early for logistical planning
- ✓ Allows flexibility to fast track project
- ✓ Contractor input is received before bidding
- ✓ Contract is open book and costs are audited

"It's all about Risk Management"

MSBA Experience

Consensus Through Engagement



MSBA Experience

Preferred Option Cost Analysis

	Program does not fit on site	Program does not fit on site	Alt. C - Stanley Elem. School Minimal Add/Renovation	Alt. D - Stanley Elem. School Enhanced Add/Renovation	Alt. E - New 7 Story Building on Stanley Elemt. School Site	Alt. F - New 7 Story Elemt. School at Stanley Site (W/G Lincoln School Model)	Alt. G - New 4 Story Elemt. School at Stanley Site	Alt. H - New 4 Story Elemt. School at Middle School Site	Alt. I - Renovations of Stanley, Hadley and Clarke over time. Base Repair Option
PROGRAM									
Enrollment	275	275	215	275	275	275	635	635	635
Total Area of Renovation	27,796	45,819	40,163	40,163	0	0	0	0	113,982
Total Area of New Construction	27,068	17,458	16,910	22,321	56,111	100,000	100,283	100,283	99,488
Total Building Area	54,865	63,277	57,073	62,484	56,111	100,000	100,283	100,283	99,488
Construction Start	Jul-15	Jul-15	Jul-15	Jul-15	Jul-15	Jul-15	Jul-15	Jul-15	Jan-14
Project Duration	16 months	16 months	16 months	16 months	16 months	16 months	20 months	20 months	5 years
School Opens	Jan-17	Feb-17	Feb-17	Feb-17	Feb-17	Feb-17	Apr-17	Apr-17	Feb-19
TOTAL PROJECT BUDGET									
PROJECT TOTALS	\$ 19,472,680.00	\$ 23,683,400.00	\$ 19,473,400.00	\$ 23,683,400.00	\$ 21,292,800.00	\$ 25,778,450.00	\$ 39,372,450.00	\$ 38,363,900.00	\$ 39,774,000.00
Total Reimbursable Costs*	\$ * * *	\$ * * *	\$ 15,700,362.00	\$ 17,500,068.00	\$ 21,392,465.50	\$ 34,994,440.50	\$ 35,378,613.50	\$ 33,868,161.00	\$ * * *
Total Non-Reimbursable Costs*	\$ 19,472,680.00	\$ 23,683,400.00	\$ 3,773,088.00	\$ 3,788,732.00	\$ 4,385,894.50	\$ 4,716,509.50	\$ 4,494,036.50	\$ 4,495,739.00	\$ 39,774,000.00
Estimated MSBA Reimbursement **	\$ * * *	\$ * * *	\$ 7,065,162.90	\$ 7,870,830.60	\$ 9,626,609.48	\$ 17,497,220.25	\$ 15,920,376.08	\$ 15,240,672.45	\$ * * *
Estimated Stamps/ott Share	\$ 19,472,680.00	\$ 23,683,400.00	\$ 12,408,237.10	\$ 13,415,969.40	\$ 16,151,340.33	\$ 22,213,729.75	\$ 23,952,273.93	\$ 23,123,227.55	\$ 39,774,000.00
									Subject to MSBA invitation

MSBA Experience

MSBA's Form 3011

Total Project Budget

Total Project Budget			
Southeastern Regional School District			
Southeastern Regional Vocational Technical High School	*Cost/Scope Items Excluded from the Total		
TOTAL PROJECT BUDGET - ALL COSTS ASSOCIATED WITH THE PROJECT ARE SUBJECT TO 963 CMR 2.16(5)			
Feasibility Study Agreement			
OPM Feasibility Study			
A&E Feasibility Study			
Env. & Site			
Other			
Feasibility Study Agreement Subtotal			
Administration			
Legal Fees			
Owner's Project Manager			
Design Development			
Construction Contract Documents			
Bidding			
Construction Contract Administration			
Closeout			
Extra Services			
Reimbursable & Other Services			
Cost Estimates			
Advertising			
Permitting			
Owner's Insurance			
Other Administrative Costs			
Administration Subtotal			
Architecture and Engineering			
Basic Services			
Design Development			
Construction Contract Documents			
Bidding			
Construction Contract Administration			
Closeout			
School District Share	\$8,271,679.79		

*NOTE: This document was prepared by the MSBA based on a preliminary review of information and estimates provided by the Southeastern Regional School District for the Southeastern Regional Vocational Technical High School project. Based on this preliminary review, certain budget, cost and scope items have been determined to be ineligible for reimbursement; however, this document does not contain a final, exhaustive list of all budget, cost and scope items which may be ineligible for reimbursement by the MSBA. Nor is it intended to be a final determination of which budget, cost and scope items may be eligible for reimbursement by the Authority, and the Authority shall determine, in its sole discretion whether any such budget, cost and scope items are eligible for reimbursement.

**NOTE: Pursuant to Section 3.20 of the Project Funding Agreement and the applicable policies and guidelines of the Authority, any project costs associated with the reallocation or transfer of funds from either the Owner's contingency or the Construction contingency to other budget line items shall be subject to review by the Authority to determine whether any such costs are eligible for reimbursement by the Authority.

Management Approach



MSBA / Town of Braintree, Braintree Public Schools
East Middle School Addition / Renovation
February 26, 2019

Project Dashboard

Project Accomplishments this Month

- Completion of exterior framing and Air Vapor Barrier
- Roofing complete
- MEP is on-going on 1st and 2nd floor
- Window installation
- Elevator pit is dug and concrete is on-going
- Continue exterior brickwork
- Complete building systems coordination and rough in piping
- Continue interior MEP rough in
- Continue window installation
- Ground floor insulation and drywall

Projected Major Tasks next Month

- Getting Commissioning Agent input on AVB and window install.
- Continue with asbestos abatement as needed.
- Keep building weather tight to allow interior work to begin.
- Complete final MEP coordination.
- Complete elevator pit excavation without disturbing school.
- Install revised structure frames for roof equipment
- "Pall Plan" with all subcontractors to finalize production schedule
- Develop a detailed Pall Plan for summer 19 and Phase 2 work
- Complete work on fields in time to seed in May
- Monitor SDC effort to recover schedule delays.

Schedule Summary - Upcoming Milestones

	Scheduled Start	Scheduled Finish	Actual Start	Actual Finish
GMP with Shawmut	7/5/18	11/16/18	6/24/18	6/27/2018
- New Cafeteria / Temp Guidance	5/29/18	8/15/18	5/29/18	8/15/2018
Phase 1B - Foundation - Phase 1 -	8/6/18	10/5/18	8/9/18	9/15/2018
Steel Erection - Phase 1 - New Bldg -	6/24/18	8/24/18	6/24/18	8/24/2018
Phase 1A - Summer 2018 - Demo	9/26/18	9/12/18	9/12/18	10/15/2018
- Topping Off Steel - Phase 1 - New Bldg -	7/15/18	10/12/18	7/6/18	4/26/18
- Underground utilities- Phase 1	4/16/18	10/11/18	9/19/18	10/11/18
Site Phase 1 - New Construction	9/17/18	1/14/19	11/5/18	11/1/18
- Slab on Deck	10/15/18	12/31/18	10/5/18	2/13/19
- Exterior Framing				
- Roof construction				
- Exterior substantially complete Phase 1				
- Phase 1 substantial completion				

Scope Shifted from the Original Scope

- Additional data outlets in each classroom

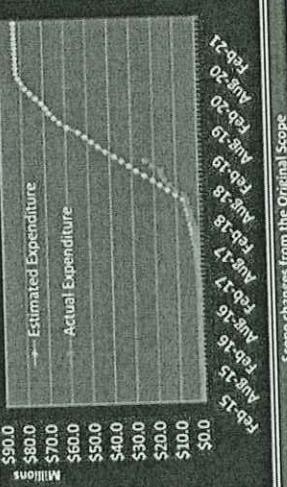
- Elevator relocation due to unforeseen underground utilities

Hill International

Current Progress Photos



Project Cash Flow - Plan vs Actual



Scope Shifted from the Original Scope

- Additional data outlets in each classroom

- Elevator relocation due to unforeseen underground utilities

Description	PROJECT FINANCIAL OVERVIEW			CASH FLOW				
	BUDGET	Approved Budget	Committed Costs	Uncommitted Costs	Forecast Costs	Total Project Costs	Expenditures to Date	Balance To Spend
Construction	\$ 67,886,699	\$ (1,323,763)	\$ 66,562,936	\$ 0	\$ 1,104,918	\$ 67,667,854	\$ 16,866,631	\$ 50,801,223
Design Services	\$ 7,082,476	\$ 309,880	\$ 7,372,356	\$ -	\$ -	\$ 7,372,356	\$ 5,524,369	\$ 1,847,987
Administrative	\$ 2,480,643	\$ 81,200	\$ 2,561,843	\$ 115,000	\$ -	\$ 2,561,843	\$ 1,168,442	\$ 1,333,401
FF&E	\$ 2,832,000	\$ 80,261,818	\$ (932,683)	\$ 2,832,000	\$ 15,156	\$ 2,832,000	\$ 15,156	\$ 2,816,844
SUBTOTAL	\$ 83,472,211	\$ -	\$ 76,397,291	\$ 2,931,844	\$ 1,104,918	\$ 80,434,053	\$ 23,574,598	\$ 56,859,455
Owner's Construction Contingency	\$ 2,715,468	\$ 1,245,763	\$ 3,961,231	\$ -	\$ 3,961,231	\$ (1,104,918)	\$ 2,856,313	\$ -
Owner's Soft Cost Contingency	\$ 494,925	\$ (313,080)	\$ 181,845	\$ -	\$ 181,845	\$ 181,845	\$ -	\$ 181,845
SUBTOTAL	\$ 3,210,393	\$ 932,683	\$ 4,143,076	\$ -	\$ 4,143,076	\$ (1,104,918)	\$ 3,038,158	\$ 3,038,158
PROJECT TOTAL	\$ 83,472,211	\$ -	\$ 83,472,211	\$ 76,397,291	\$ -	\$ 83,472,211	\$ 23,574,598	\$ 59,897,513

Management Approach

August 9, 2018

Project Budget and Cost Summary



Description	BUDGET		COST		CASH FLOW		K [F+G+H] [I-J]
	Baseline Budget	Approved Changes	Committed Costs	Uncommitted Costs	Forecast Costs	Total Project Costs	
	(Budg. Adj. Tab)	(C+D)	(Com. Cost Tab)	(E+F)	(Forecast Tab, >G)	(H)	
2.0 Construction	\$3,461,975	\$1,63,764	\$3,625,739	\$0	\$3,625,739	\$1,73,736	\$3,799,475
Subtotal	\$3,461,975	\$1,63,764	\$3,625,739	\$0	\$3,625,739	\$1,73,736	\$3,799,475
3.0 Architectural & Engineering							
Designer - Basic Services (Lead)	\$50,000	\$7,626	\$42,374	\$0	\$42,374	\$0	\$2,693
Designer - Basic Services (Local)	\$475,000	\$85,000	\$390,000	\$0	\$394,732	\$0	\$227,431
Other Basic Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Reimbursable Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal	\$525,000	\$92,626	\$432,374	\$0	\$437,106	\$0	\$230,122
4.0 Administrative Costs							
Owner's Project Manager Basic Services	\$208,725	\$17,300	\$316,025	\$0	\$316,025	\$0	\$176,710
OPM Reimbursables & Other Services	\$17,300	\$-17,300	\$0	\$0	\$0	\$0	\$0
Other Admin Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$176,710
Subtotal	\$226,025	\$0	\$316,025	\$0	\$316,025	\$0	\$176,710
5.0 Furniture, Fixtures and Equipment & Misc							
Furniture, Fixtures and Equipment (Boss)	\$1,70,000	\$-20,000	\$150,000	\$0	\$150,000	\$0	\$150,000
Flik Servicewares	\$55,000	\$55,000	\$0	\$0	\$33,569	\$0	\$33,569
Technology	\$50,000	\$16,431	\$33,569	\$0	\$33,569	\$0	\$55,000
Construction Testing & Inspections	\$5,000	\$5,000	\$0	\$0	\$5,000	\$0	\$0
Moving Cost	\$0	\$5,000	\$0	\$0	\$5,000	\$0	\$5,000
Artwork & Objects	\$0	\$86,431	\$193,569	\$0	\$193,569	\$0	\$193,569
Subtotal	\$5,80,000	\$-86,431	\$315,631	\$0	\$315,631	\$0	\$150,000
Project Sub-Total	\$4,383,000	\$-15,293	\$4,567,707	\$0	\$4,746,175	\$0	\$4,746,175
7.0 Project Contingency							
Owner's Construction Contingency (Hard Cost)	\$614,200	\$-614,200	\$0				
Owner's Contingency (Soft Cost)	\$302,800	\$129,493	\$432,293				
Subtotal	\$917,000	\$-484,707	\$432,293				
Project Total	\$5,500,000	\$-500,000	\$5,000,000		\$178,468	\$5,000,000	\$146,399
Remaining Contingency							
\$173,736							
\$173,736							
\$427,561							
\$253,825							
\$4,653,701							

MEP / Commissioning



MSBA Commissioning Certificate of Completion

MASSACHUSETTS SCHOOL BUILDING AUTHORITY <u>BROOKLINE SCHOOL DISTRICT</u> <u>PIERCE SCHOOL</u>	PROJECT # <u> </u> COMMISSIONING CERTIFICATE OF COMPLETION REPAIR PROGRAM (for Projects not having a 10 month CX re-inspection)
---	--

The undersigned Commissioning Consultant hereby certifies that all requirements for commissioning have been completed in accordance with the Master Commissioning Services Agreement dated and Work Order No. dated between the Commissioning Consultant and the MSBA.

Commissioned Systems:

Applicable	Not Applicable	Windows and Doors
<input type="checkbox"/>	<input type="checkbox"/>	Roofing Systems
<input type="checkbox"/>	<input type="checkbox"/>	Boiler Systems
<input type="checkbox"/>	<input type="checkbox"/>	Other (specify: _____)
<input type="checkbox"/>	<input type="checkbox"/>	

Functional performance tests for each sub-system and system as established by the Commissioning Plan have been executed and satisfactory performance has been achieved.

1. Functional performance tests for each sub-system and system as established by the Commissioning Plan have been executed and satisfactory performance has been achieved.
2. All items listed on the Issues Log have been appropriately resolved.
3. A Final Commissioning Report has been submitted to the MSBA and the Owner.

Certified: Commissioning Consultant (sign)

Firm: _____

Type name: _____

Title: _____

Date: _____

The Owner's Project Manager acknowledges:

1. Functional performance tests for each sub-system and system as established by the Commissioning Plan have been executed and satisfactory performance has been achieved.
2. All items listed on the Issues Log have been appropriately resolved.
3. A Final Commissioning Report has been submitted to the MSBA and the Owner.

Acknowledged: Owner's Project Manager (sign)



MEP / Commissioning

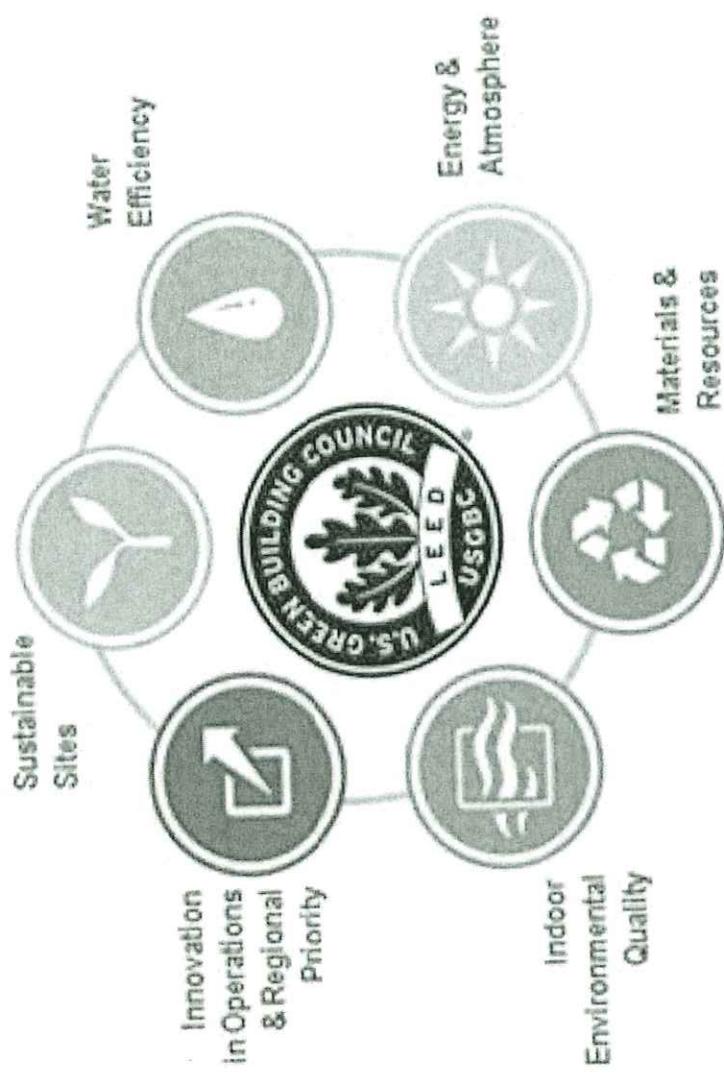
Design Development Documents Review				Comments	Response Date	Response
Item	Drawing/ Specification	Reference				
Drawings						
<i>General</i>						
<i>Civil</i>						
<i>Landscape</i>						
<i>Structural</i>						
<i>Architectural</i>						
<i>Fire Protection</i>						
Plumbing						
1	P2.0	Col D.8/11		Consider not routing plumbing vents horizontally below grade for the two mechanical room floor drains.		
2	P4.0	General		Coordinate access panels with plumbing isolation valves serving fixtures, consider locating valves out in ACT areas if restroom ceilings will be Gyp board. It would allow the restroom ceilings not to be so cluttered.		
3	P4.0	General		Consider adding wall clean outs for waste laterals in walls serving wall hung water closets.		
4	P3.1	General		Consider locating exterior hose bids if owner wants them, it appears none are shown at this time.		
5	P4.3	GW-H-1 and 2		Exhaust Venting and intake venting routes seem long. Verify heaters can be installed with venting routes proposed. This venting is also shown on H1.1. Consider not showing it on both drawings to avoid duplicate scopes		
HVAC						
1	H3.2	General		Consider adding some general ventilation/fans in the Boiler Room to allow for heat removal from the heat generation equipment.		
2	H1.2	AHU		Consider adding notes and information for coil pull removal and access.		
3	H3.1	General		Consider showing clearance for chiller tube bundle removal and cleaning and adding notes for required clearance around chiller control panels per the NEC.		
4	H1.1	Normal Elect Rm 218		Consider adding some general ventilation/fans in the Elect Room to allow for heat removal from the heat generating equipment.		

Sustainability



Hill is aware of Brookline's Climate Action Committee

LEED Credit Categories



LEED Projects:

- ✓ Watertown 3 Schools, LEED/ Net Zero
- ✓ UMass Amherst Design Building, LEED Gold (Net Zero Design)
- ✓ UMass Amherst South College, LEED Gold
- ✓ Webster ES, LEED Gold
- ✓ Estabrook ES, LEED Silver
- ✓ East Bridgewater HS, LEED Silver
- ✓ Natick HS, LEED Silver
- ✓ Northeastern ISEC, LEED Gold
- ✓ Braintree East Middle School, LEED Silver
- ✓ Swampscott Hadley Elementary School, LEED

Your Success is Our Success

COMMUNITY
EDUCATORS FAMILIES
STUDENTS
ADMINISTRATORS COMMUNITY LEADERS
PARENTS NEIGHBORS
COMMITTEES BOARDS

VISION

EQUITY
ACCESSIBILITY EDUCATION
SPECIALIZED LEARNING LOCATION SAFETY
MINIMAL TRANSITIONS

VALUE
TRAFFIC FISCAL RESPONSIBILITY SUSTAINABILITY ENERGY EFFICIENCY



**"It's All About
the Brookline
Community"**

✓ Your Opinions

✓ Your Ideas

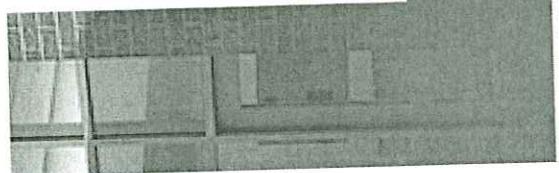
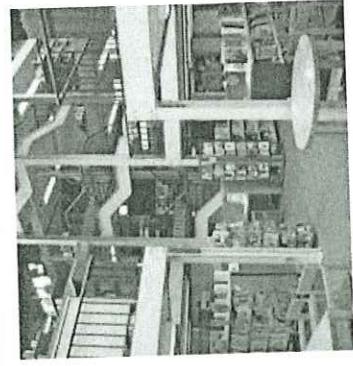
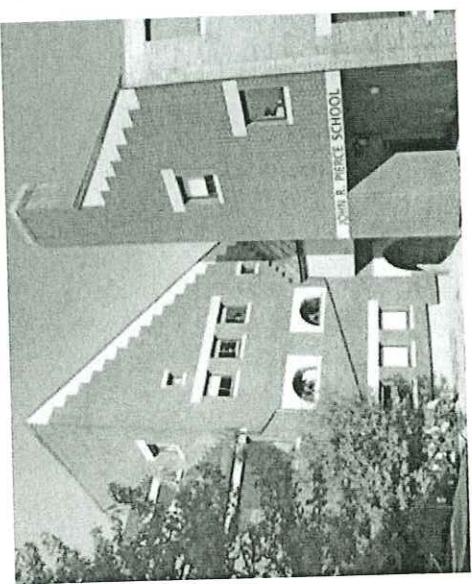
✓ Your School

✓ Maintain budget
and schedule

✓ Keep the stakeholders/
community informed
and aware



Questions and Answers



HILL

Hill International

HILL

Hill International

www.hillintl.com

Your Project Team



◆ Key Personnel

◆ PROJECT DIRECTOR
Vivian Verbedian, MCPPO

◆ PROJECT MANAGER
Mary Mahoney, MCPPO

IN-HOUSE CONSULTANT (MEP)
Richard Anderson, MCPPO

◆ ASSISTANT PROJECT MANAGER
Alex Crowley

◆ SITE MANAGER
Roger Boddie

PRINCIPAL-IN-CHARGE
Peter Martini, MCPPO



Project Understanding

Community Engagement

Project Charter

Definition of Project Success

The top ranked items voted by the community, the committee, and the project team that will make the Concord Middle School a success are listed below.

The Goals for the Bird Middle School are :

- ✓ Provide a new 21st Century School for Middle School Students
- ✓ Resolve the challenges with aging building systems
- ✓ Resolve the issues of traffic flow
- ✓ Unify the Town in support of the project.
- ✓ Be a safe and secure building incorporating the latest security features in design with CCTV monitoring
- ✓ Construction will be of the highest quality, a building designed to last
- ✓ Be age appropriate and scaled for the middle school age group
- ✓ Have the latest technology with easy access to IT and media for students, a 21st Century learning environment
- ✓ Have low energy and maintenance costs
- ✓ Incorporate Green Technologies and Sustainable Design
- ✓ Have open and welcoming spaces with central access point
- ✓ Be easy to navigate for students
- ✓ Serve as a community resource with spaces for community use.
- ✓ Use the building process to engage and excite the community
- ✓ Responsible Visible Value
- ✓ Provides an excellent healthy safe environment for occupants
- ✓ The School will be delivered on time and on budget.

Vivian

INPUT & COMMUNITY SUPPORT THROUGH FEASIBILITY STUDY

Project Charter

Definition of Project Success

- March 2, 2017 SBC Meeting
- March 9, 2017 SBC Meeting
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- June 20, 2017 SBC Meeting
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Additional 20+ meetings with the School and Town Departments have taken place

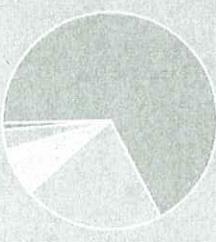


Project Understanding

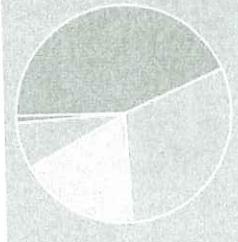
Mary

COMMUNITY SURVEY (668 RESPONDENTS)

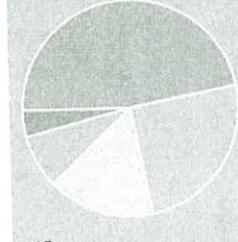
The issue of parity was raised during the review of alternatives. How important is it that all middle school students of the same grades receive the same educational experience from the School Building project?



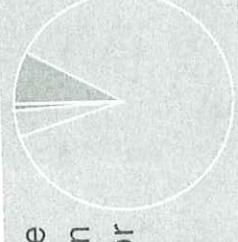
How important is a solution that reduces the amount of transitions between schools?



How important is a solution that also helps to address the District's ability to provide All Day Kindergarten?



The School Building Committee narrowed the viable options to two final designs. Which of the following design alternatives provides the best long-term solution for educating Weymouth middle school children?



Management Approach

Risk Register

PROPERTY SERVICES - PROJECT RISK & ISSUE LOG

PROJECT RISK & ISSUE LOG										RISK REGISTER	
PROJECT ID	PROJECT DESCRIPTION			PROJECT MANAGEMENT			PROJECT ACTIVITIES			Risk Owner	Risk Type
	Project Name	Project Description	Project Status	Lead Manager	Lead Sub Manager	Impact	Severity	Probability	Impact Rating		
1	Building Upgrade	Building Upgrade	In Progress	Project Manager	Site Lead	Medium	Medium	Medium	Medium	Project Manager	External
2	Park Open	Public Park	Completed	Local Council	Community	Low	Low	Low	Low	Local Council	Internal
3	Residential Lease	Residential Lease	In Progress	Landlord	Tenant	Medium	Medium	Medium	Medium	Landlord	External
4	Commercial Lease	Commercial Lease	In Progress	Landlord	Tenant	Medium	Medium	Medium	Medium	Landlord	External
5	Office Fitout	Office Fitout	In Progress	Project Manager	Office Manager	High	High	Medium	Medium	Project Manager	External
6	Supply Chain Delays	Supply Chain Delays	In Progress	Supplier	Logistics Manager	Medium	Medium	Medium	Medium	Supplier	External
7	Employee Turnover	Employee Turnover	In Progress	HR Manager	Team Leader	Medium	Medium	Medium	Medium	HR Manager	External
8	Financial Crisis	Financial Crisis	In Progress	Finance Manager	Investment Manager	High	High	Medium	Medium	Finance Manager	External
9	Political Instability	Political Instability	In Progress	Political Advisor	Country Representative	Medium	Medium	Medium	Medium	Political Advisor	External
10	Geopolitical Events	Geopolitical Events	In Progress	Political Advisor	Country Representative	Medium	Medium	Medium	Medium	Political Advisor	External
11	Technological Failure	Technological Failure	In Progress	IT Manager	System Administrator	Medium	Medium	Medium	Medium	IT Manager	External
12	Regulatory Changes	Regulatory Changes	In Progress	Regulatory Manager	Policy Analyst	Medium	Medium	Medium	Medium	Regulatory Manager	External
13	Supply Chain Issues	Supply Chain Issues	In Progress	Supplier	Logistics Manager	Medium	Medium	Medium	Medium	Supplier	External
14	Employee Health	Employee Health	In Progress	HR Manager	Team Leader	Medium	Medium	Medium	Medium	HR Manager	External
15	Political Events	Political Events	In Progress	Political Advisor	Country Representative	Medium	Medium	Medium	Medium	Political Advisor	External
16	Geopolitical Events	Geopolitical Events	In Progress	Political Advisor	Country Representative	Medium	Medium	Medium	Medium	Political Advisor	External
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20	Employee Health	Employee Health	In Progress	HR Manager	Team Leader	Medium	Medium	Medium	Medium	HR Manager	External
21	Political Events	Political Events	In Progress	Political Advisor	Country Representative	Medium	Medium	Medium	Medium	Political Advisor	External
22	Geopolitical Events	Geopolitical Events	In Progress	Political Advisor	Country Representative	Medium	Medium	Medium	Medium	Political Advisor	External
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26	Employee Health	Employee Health	In Progress	HR Manager	Team Leader	Medium	Medium	Medium	Medium	HR Manager	External
27	Political Events	Political Events	In Progress	Political Advisor	Country Representative	Medium	Medium	Medium	Medium	Political Advisor	External
28	Geopolitical Events	Geopolitical Events	In Progress	Political Advisor	Country Representative	Medium	Medium	Medium	Medium	Political Advisor	External

Management Approach



Schematic Design Documents

A	B	C	D	E	F	G	H (F-G)	I	J	K	
Item #	VE/VM Items	Trade	Risks	Comments	Ball In Court	Estimated Value	Cost to Implement	Net Savings	Status	Accepted Value	Rejected Value
LEVEL 1: Items, if accepted would not affect/ would minimally affect the Program/ Design intent											
01.											
02.	Eliminate Electric Car Charging Stations	Site / Electric	Loss of load point, loss of equality between structures/ green initiative.	Owner accepted. Will allow for more parking, should not effect overall Leed certification.	Estimators	\$50,000	\$0	\$50,000	Accepted	\$50,000	\$0
03.	Reduce the amount of curtain wall on the north side of the Gym. Step 1 (approximately 800 sf)	Brick / Curtain wall	Slight reduction of natural light.	Owner Accepted. Nothing switching to reduce cost on the Gym North side should be done.	Estimators	\$106,000	\$53,000	\$53,000	Accepted	\$53,000	\$0
04.	Reduce a larger amount of curtain wall on the north side of the Gym. Step 2 (total reduction 1200 sf)	Brick / Curtain wall	Could further reduce natural lighting	Owner noted additional savings on the North side of the Gym should be reviewed. Design team to continue to review options, through	Estimators	\$53,000	\$26,500	\$26,500	Accepted	\$26,500	\$0
05.	Reduce a larger amount of curtain wall on the north side of the Gym. Step 3 (see item 3 & 4 above)	Brick / Curtain wall	Could further reduce natural lighting	Design Team					TBD	Under Review	\$0
06.	Reduce or adjust masonry assemblies on the north side of the Gym. Also can look at other areas.	Brick	could effect the overall design slight visual down grade.								
13.	Terrazzo Flooring - Step 2, adjust area, reduce Terrazzo areas.	Terrazzo floor/ resilient flooring	Lower grade and potentially costs.								
LEVEL 2: Items, if accepted could affect Program / Design intent											
43.											
44.	Delete windows at corner rooms, and replace with brick. In classrooms that already have 1 wall of windows, they will not have a second wall of windows (approx 912 sf)	Brick /'Curtain wall'	Slight reduction of natural light.	Owner accepted. Will not impact rest of building footprint.	Estimators	\$26,500	\$0	\$26,500	Accepted	\$26,500	\$0
45.	Look for alternatives to metal pane and curtain wall systems. Evaluate if curtain wall could be adjusted to constraint in some locations.	curtain wall / Metal Panels	could effect the overall design down grades, depending on presented.	Owner accepted. Will not impact rest of building footprint.	Estimators	\$15,000	\$0	\$15,000	Accepted	\$15,000	\$0
46.	Maintain the scope of relocating the newer Modular Classroom from the project	Specified sub	Units have to be moved, the away, just moving from the	Owner accepted. Will not impact rest of building footprint.	Estimators	\$15,000	\$0	\$15,000	Accepted	\$15,000	\$0
61.	Review options on HVAC, Reductions in the gym or other areas.	HVAC	Would impact the program equal to East.	Owner accepted. Will not impact rest of building footprint.	Estimators	\$15,000	\$0	\$15,000	Accepted	\$15,000	\$0
63.	Target reduction in light fixture costs	Electrical	Would impact the program equal to East.	Owner accepted. Will not impact rest of building footprint.	Estimators	\$15,000	\$0	\$15,000	Accepted	\$15,000	\$0
64.	Need MEES Approval	Various	None	None	None	\$0	\$0	\$0	None	\$0	
TOTALS											
25.	Red	Green	Green	Green	Green	\$15,000	\$0	\$15,000	Accepted	\$15,000	\$0

Value Management Log

HILL International

MDS | architecture
elements

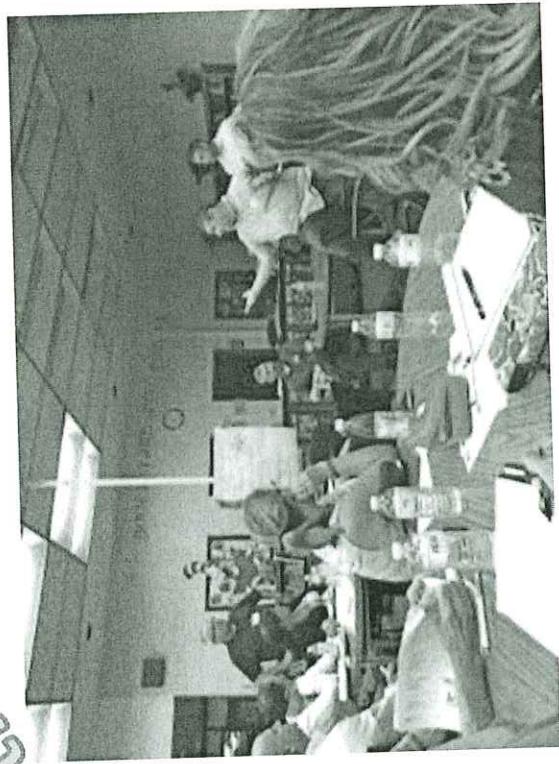
Alex

Management Approach

INPUT & COMMUNITY SUPPORT THROUGH FEASIBILITY STUDY

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Management Approach – Commissioning

Question:

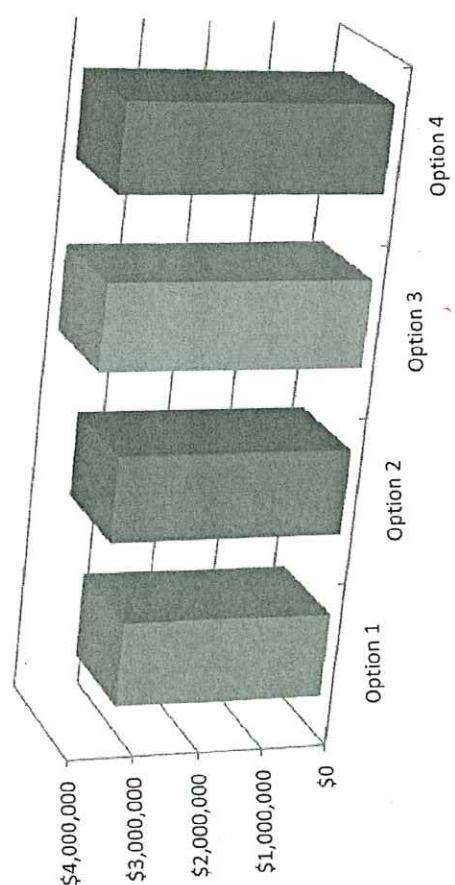
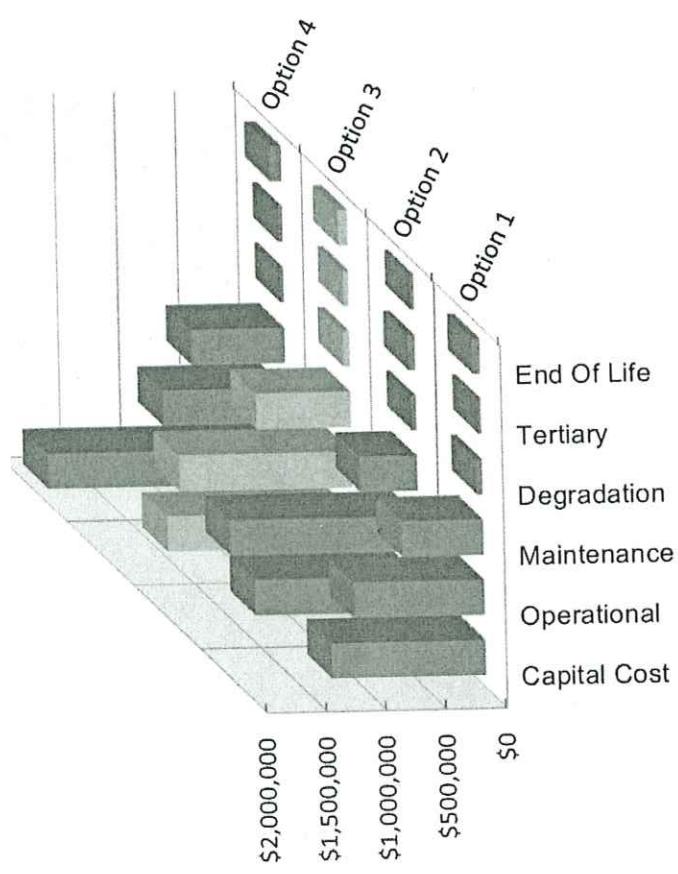
When do Commissioning Activities begin?

Answer:

The day the project starts!

- Early planning – Bring on Cx during Design Development Phase
- Define systems for Functional Performance Testing (FPT)
- Insuring that Startup & Commissioning activities are an integral part of the project schedule and not an “after thought” (allow time for activities)
- Make all stakeholders accountable – Architect, Engineers, Construction Manager, Subcontractors, Equipment Vendors
- Checking out each piece of equipment and system prior to FPT
- Pre-Functional Performance Testing by subcontractors prior to Functional Performance Testing with the commissioning agent
- Functional Performance Testing and Acceptance

Life-Cycle Cost Analysis



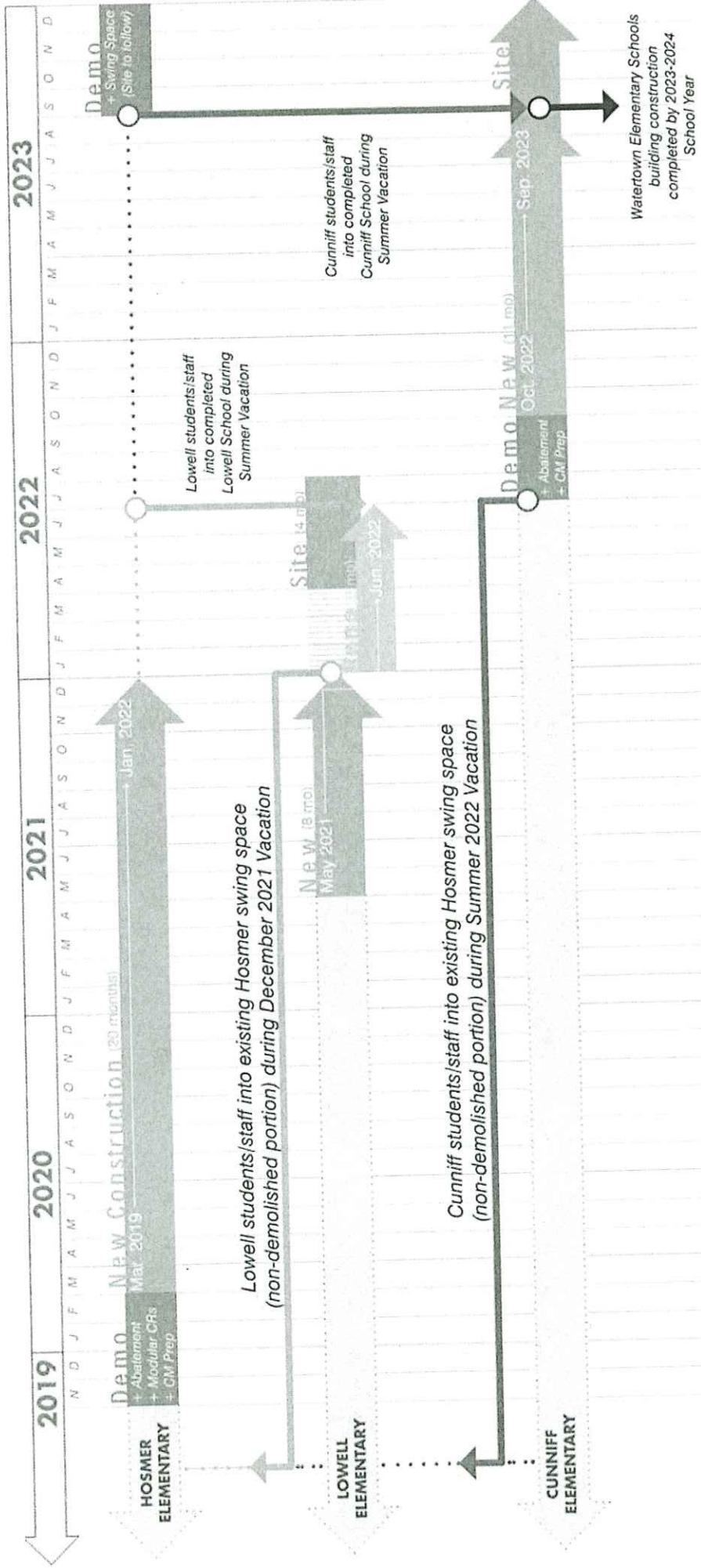
OPTION 1	OPTION 2	OPTION 3	OPTION 4
Variable Flow Refrigerant with Supplement Hydronic Heat	Variable Air Volume with Terminal Hydronic Reheat	4-Pipe Fan Coil Unit System	Geothermal Water Source
			Heat Pump



Management Approach

Vivian

Proposed Schedule per Elementary School



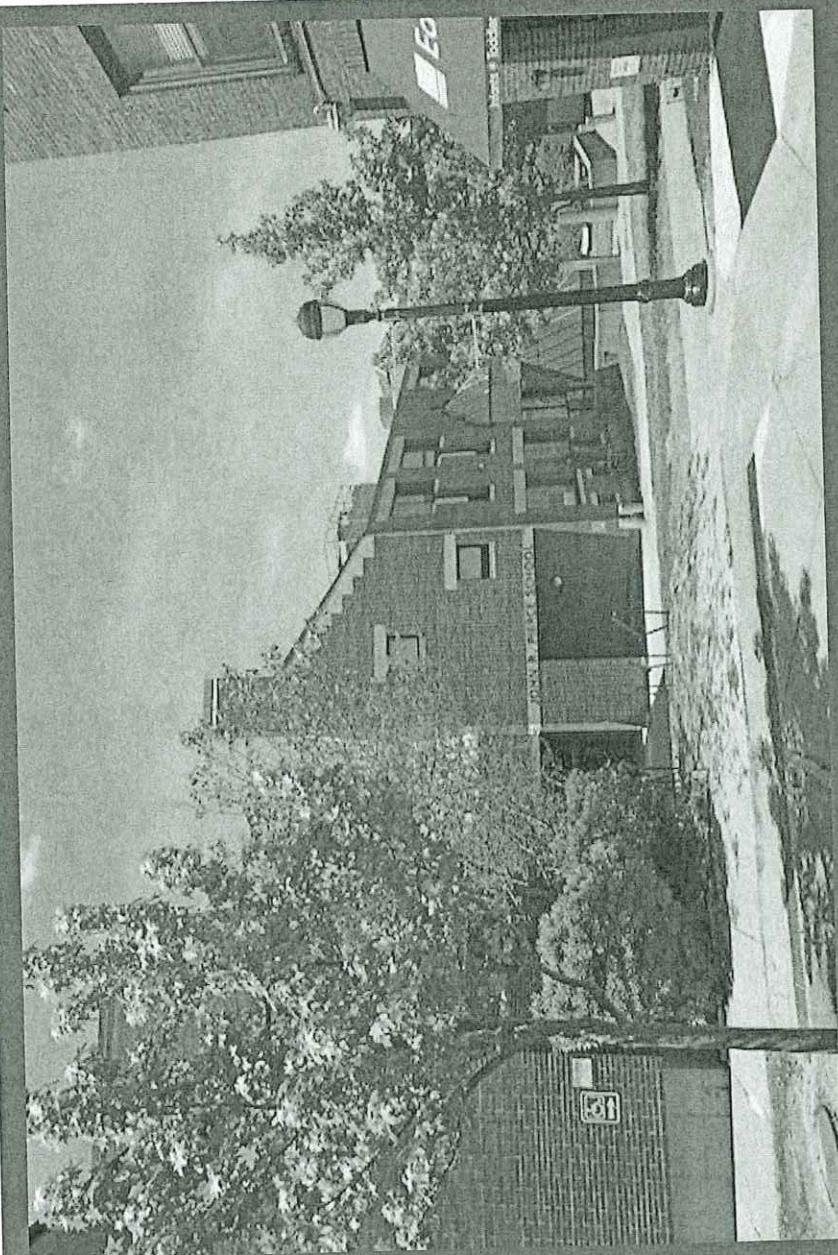
- are based on a **conceptual schedule** and not a verified construction schedule



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JOHN R. PIERCE
SCHOOL
FEASIBILITY
STUDY

JULY 9, 2020



Interview for Owner's Project Management Services

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 LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT



DERIVATION OF LEFTFIELD

left field

NOUN

leftfield (noun)

Why the name leftfield? It wasn't solely because of our love of baseball, but rather more of an idea or a passion for thinking out of the box. We have found that sometimes, the best ideas are the ones that come out of "leftfield" and may not necessarily meet the more mainstream methods or ideologies. Our "leftfield" thinking was developed through our experiences and understanding that there is not a "one size fits all" approach to a project or a program. Every client, every project, and every challenge is unique, and as such require a unique approach to achieving a successful outcome. Because of this, we embrace our "leftfield" thinking and wanted a name that accurately described our approach and our culture.



ABOUT LEFTFIELD

- LEFTFIELD is a full service Owner's Project Management Firm; having been in business for 13 years
- LEFTFIELD's staff has completed over \$2 Billion in Public Construction in Massachusetts
- LEFTFIELD's staff has worked with the MSBA since its inception
- LEFTFIELD's staff has completed over \$1.5 Billion in MSBA K-12 projects in Massachusetts
- LEFTFIELD has significant experience and success managing complex construction logistics and challenging sites
- With a staff of 26, LEFTFIELD's size is comparable to any other nationally owned OPM firm in Boston

SERVICES PROVIDED:

- Owner Representation
- Clerk of the Works
- Cost Management and Reporting
- Construction Administration
- Audit Services
- MEP Expertise

DEPTH OF OUR FIRM:

- 1 Principal
- 16 Project Managers
- 6 Clerks
- 2 MEP Specialists
- 1 Administrator

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ABOUT LEFTFIELD

Diversity

<u>Staff Member</u>	<u>Gender</u>	<u>Demographic/Background</u>	<u>Hire Date</u>	<u>Position</u>	<u>Location</u>
Gina Gomes	W (M)	Black/Cape Verdean	2017	Project Manager	Boston Area
Sally Rogers	W (M)	Black/Cape Verdean	2008	Marketing	Other
Lynn Stapleton	W	Caucasian	2015	Project Executive	Boston Area
Linda Liporto	W	Caucasian/Swedish	2020	Project Director	Boston Area
Eileen Long	W	Caucasian	2019	Project Manager	Boston Area
Jennifer Carlson	W	Caucasian	2019	Project Manager	Other
Agnes Kula ¹	W	Caucasian/Born in Poland ¹	2018	Accountant	Boston Area
Paul Gransaul	M (M)	Caucasian/Born in Trinidad	2013	Project Executive	Other
Hamdi Cobanoglu ¹	M (M)	Asian/Born in Turkey ¹	2019	Project Manager	Other

¹LEFTFIELD sponsored Citizenship status

LEFTFIELD Numbers



<u>Consultant</u>	<u>Type of Services</u>	<u>MBE/WBE</u>
TERVA Corporation	Construction Administration	MBE
Dharam Consulting	Cost Estimating	MBE
Panorama Consulting	BIM Support	MBE
Pamela Perini Consulting	Security Consulting	WBE
Rickes Associates Inc.	Planners	WBE

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AGENDA

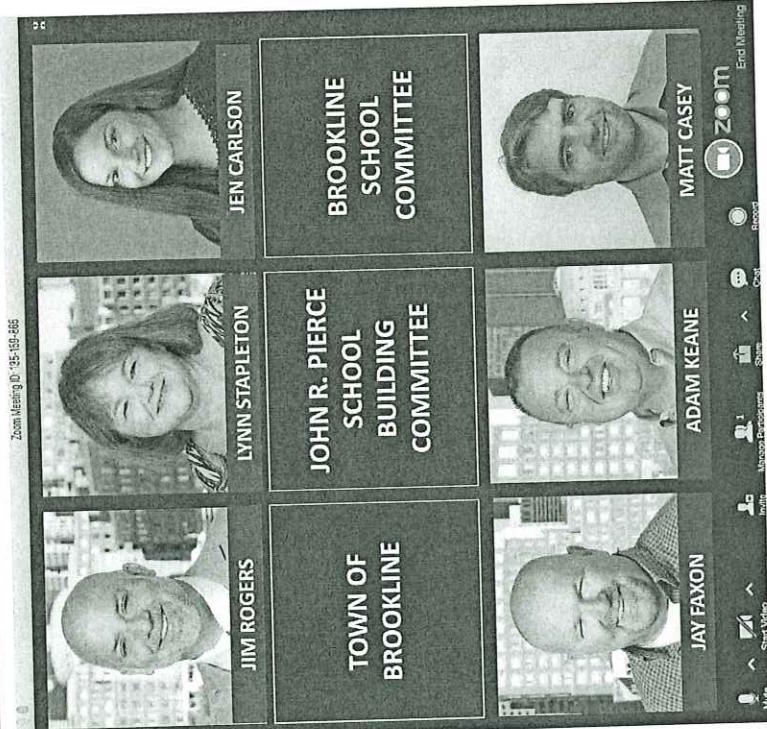
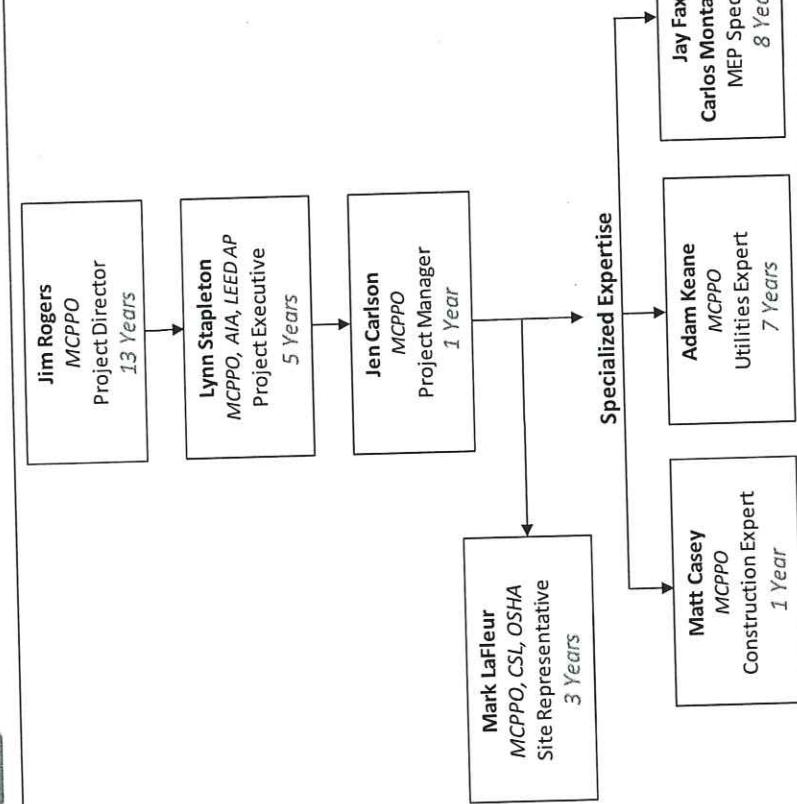
1. Introductions | Project Team
 - a. Individual Experience
 - b. Team Experience Together
 - c. Team Capacity
 - d. Competitive Advantages
2. Past Performance | Experience
 - a. Public Entities
 - b. MSBA Projects
3. John R. Pierce School
 - a. What Interests Us?
 - b. Challenges
 - c. MSBA Feasibility Schedule Analysis
 - d. Budget Analysis – New versus Renovation
4. Management of Project
 - a. Designer Procurement
 - b. MSBA Module Knowledge
 - c. Site Selection
 - d. CM Procurement
 - e. Monthly Project Reporting
 - f. Budget Management
 - g. Change Management
5. Sustainability
6. MEP & Commissioning Knowledge
7. Community Outreach
8. MSBA Systems Experience

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INTRODUCTIONS | PROJECT TEAM

Staff Chart

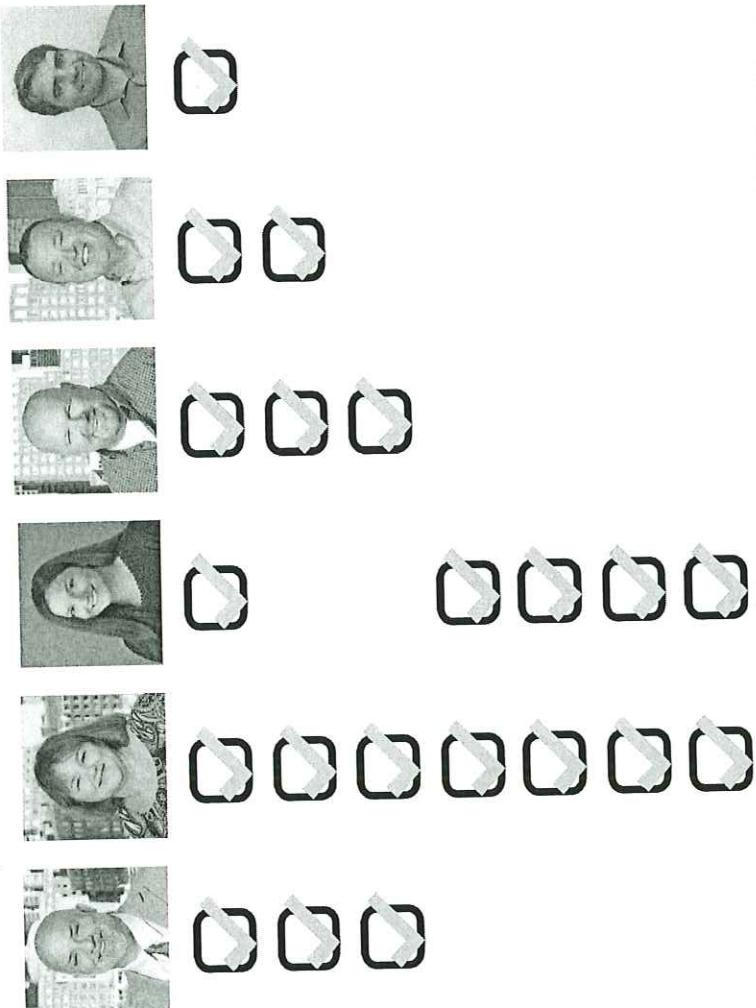


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LEFTFIELD PROJECT TEAM

Experience Together



Driscoll School, Brookline

Durfee High School, Fall River

Dale Street School, Medfield

Amesbury Elementary School, Amesbury

Galvin Middle School, Wakefield

Thurgood Marshall Middle School, Lynn

University Crossing, UMass Lowell



LEFTFIELD TEAM CAPACITY

Active Projects

TEAM MEMBER	TITLE	John R. Pierce School, Brookline*	Tyngsboro Middle School, Tyngsboro	Driscoll School, Brookline	Waltham High School, Waltham	Durfee High School, Durfee	Gerry School, Marblehead	Florence Roche, Groton-Dunstable	Dale Street School, Medfield	CAPACITY TOTAL
Jim Rogers	Project Director	25%	10%	25%	5%	5%	5%	5%	5%	85%
Lynn Stapleton	Project Executive	10%		10%	20%	15%			20%	75%
Jen Carlson	Project Manager	25%	25%							75%
Adam Keane	Utilities Expert	15%		15%	20%	40%				90%
Matt Casey	Construction Expert	15%		15%	40%					70%
Jay Faxon	MEP Specialist	5%	5%	5%	5%	5%	5%	5%		40%
Mark LaFleur	Site Representative	100%		100%						100%

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BROOKLINE



LEFTFIELD TEAM

Competitive Advantages

- Our staff has the knowledge and experience of working in Brookline Building Commission, School Committee, School Building Advisory Committee, Design Advisory Committee, Transportation Board, Planning Board, Engineering, Public Safety
- We feel we have great synergy with the stakeholders from Brookline

- Our staff's MSBA knowledge is second to none
 - Lynn has worked with the MSBA since its inception
 - Jen worked for the MSBA previously
 - MSBA is main focus and core part of business

- Lynn's prior experience working in and with school districts will prove useful during the educational program planning and visioning
- Jay's HVAC expertise will prove critical when looking at an add/reno alternative
- LEFTFIELD's team approach to applying specific job knowledge where appropriate

- Monthly reporting is something that LEFTFIELD excels at as a firm
- Unlike the other firms, LEFTFIELD is a locally owned OPM firm – focusing singularly on OPM activities – not architecture, CM work, or estimating. When there is an issue, there is one person to call.

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PAST PERFORMANCE | EXPERIENCE

PRIOR MSBA PROJECTS – SAMPLING



\$67.7M Thurgood Marshall Middle School, Lynn



\$54M Morton Middle School, Fall River



\$74.4M Wachusett Regional High School*

Wachusett Regional School District (5 Towns/Cities)



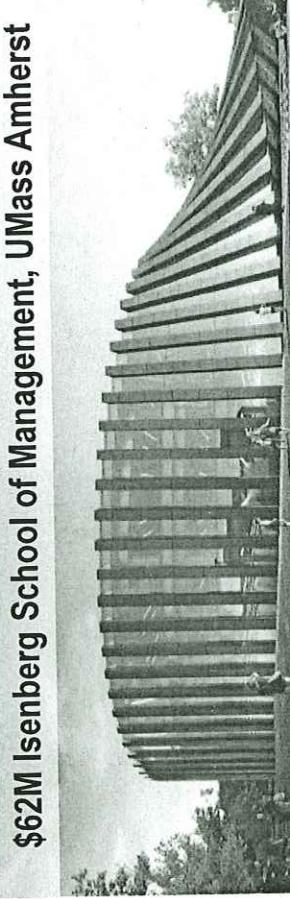
LEFT FIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

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BROOKLINE



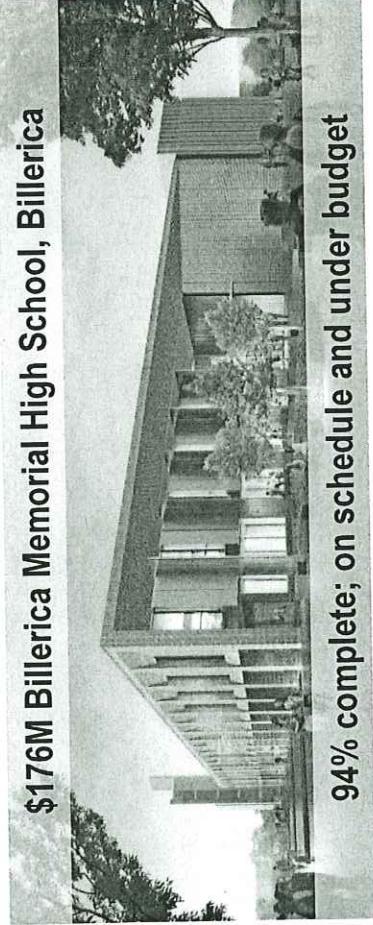
PAST PERFORMANCE | EXPERIENCE

CURRENT PROJECTS – SAMPLING



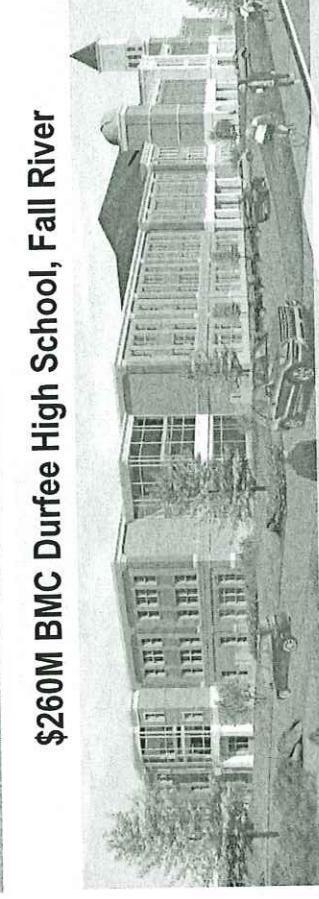
\$62M Isenberg School of Management, UMass Amherst

In Close Out; on schedule and under budget



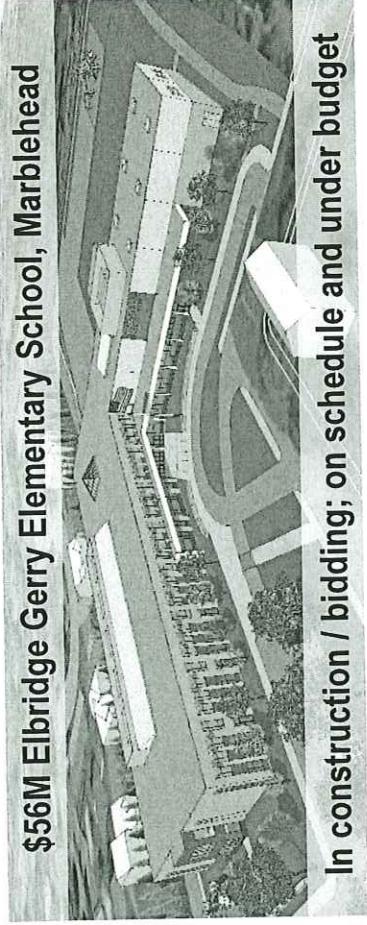
\$176M Billerica Memorial High School, Billerica

94% complete; on schedule and under budget



\$56M Elbridge Gerry Elementary School, Marblehead

In Construction; on schedule and under budget



\$260M BMC Durfee High School, Fall River

In construction / bidding; on schedule and under budget



LEFT FIELD

THE RIGHT CHOICE IN PROJECT MANAGEMENT

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Why is LEFTFIELD Interested?

- EFFICIENCY, CONTINUITY, SYNERGY: We've assigned the same LEFTFIELD team for the Pierce School that is currently working on the Driscoll School. It works very well for our team that as we transition to the construction phase with the Driscoll School, we can begin the design phase with the Pierce School. We know our client very well!
- We appreciate the history and diversity associated with the Pierce School. We're excited to help make it a resounding success.
- We have a robust team that enjoys tackling challenging projects and thinking outside the box.

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JOHN R. PIERCE SCHOOL

Challenges

- The concrete core of the existing Pierce School coupled with the open design make the building a real challenge to effectively renovate to meet the educational program.
- There is not a lot of available land in Brookline for potential new schools.
- The Pierce School is located on a tight urban site.
- The structures of the parking garage and school are intricately tied.
- With COVID-19, the current financial climate will make obtaining a vote at Town meeting very challenging.

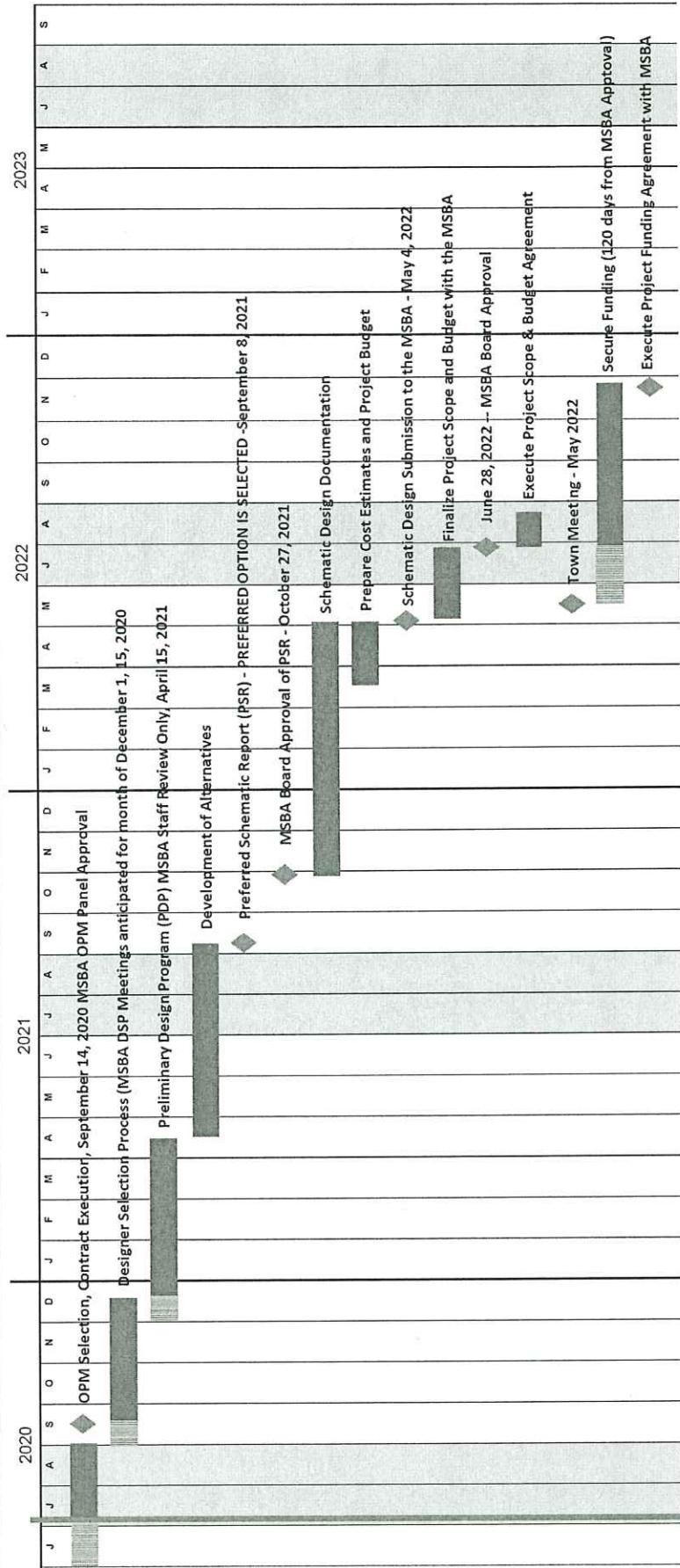


LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

PUBLIC SCHOOLS of
BROOKLINE

JOHN R. PIERCE SCHOOL

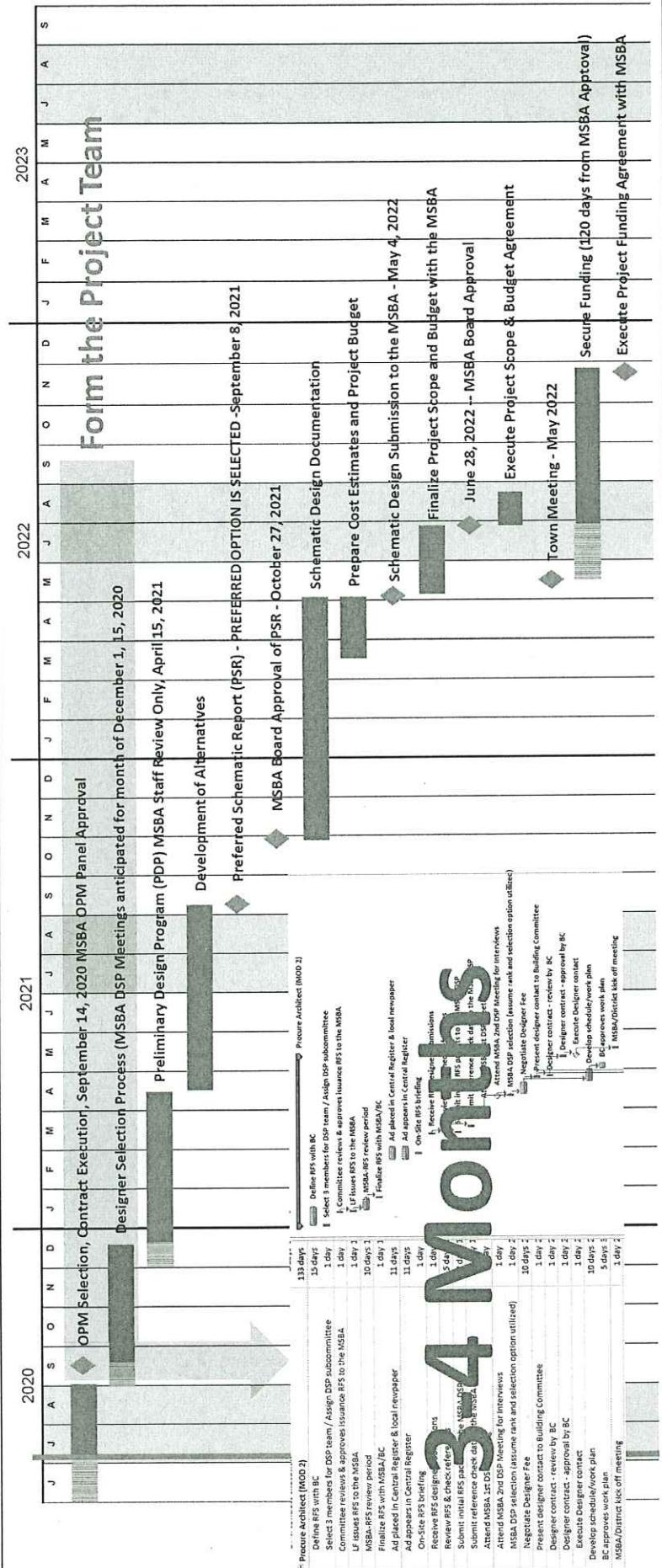
Feasibility and Schematic Design Schedule





JOHN R. PIERCE SCHOOL

Feasibility and Schematic Design Schedule

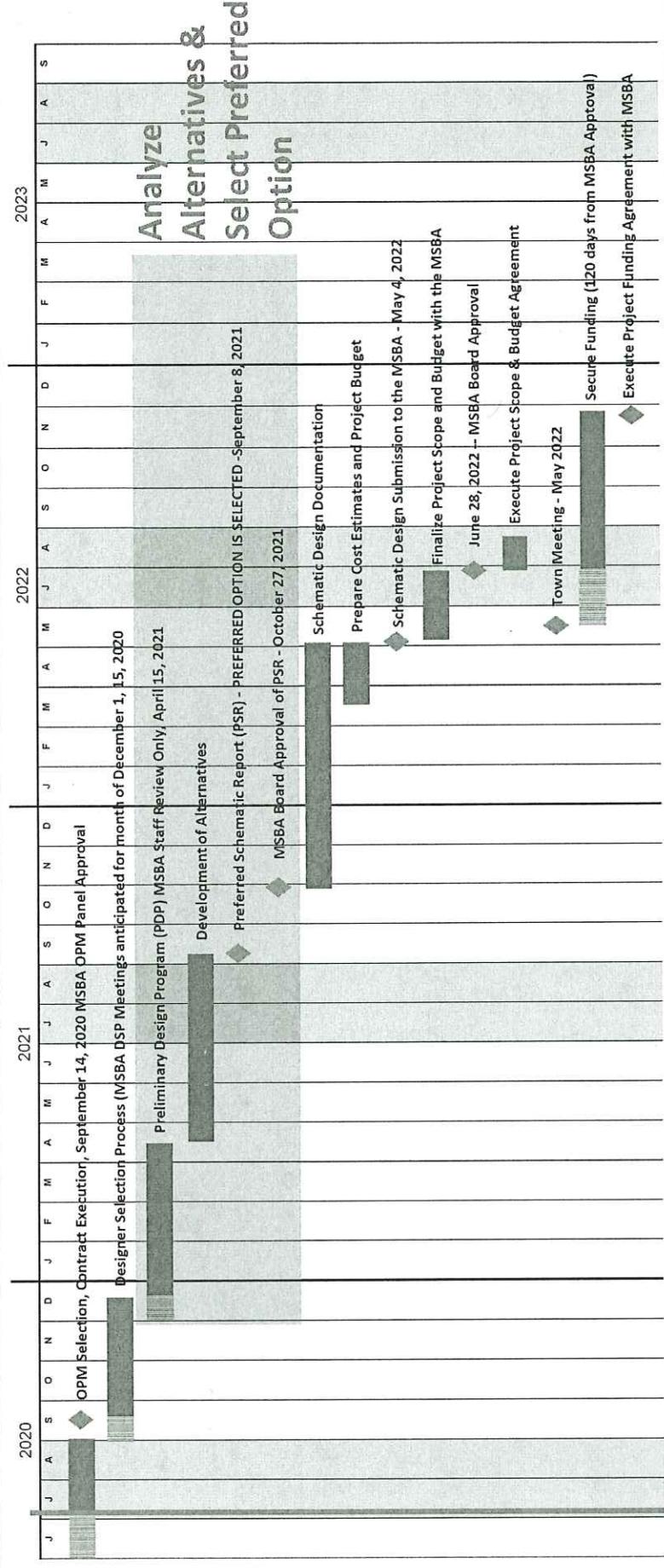


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LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

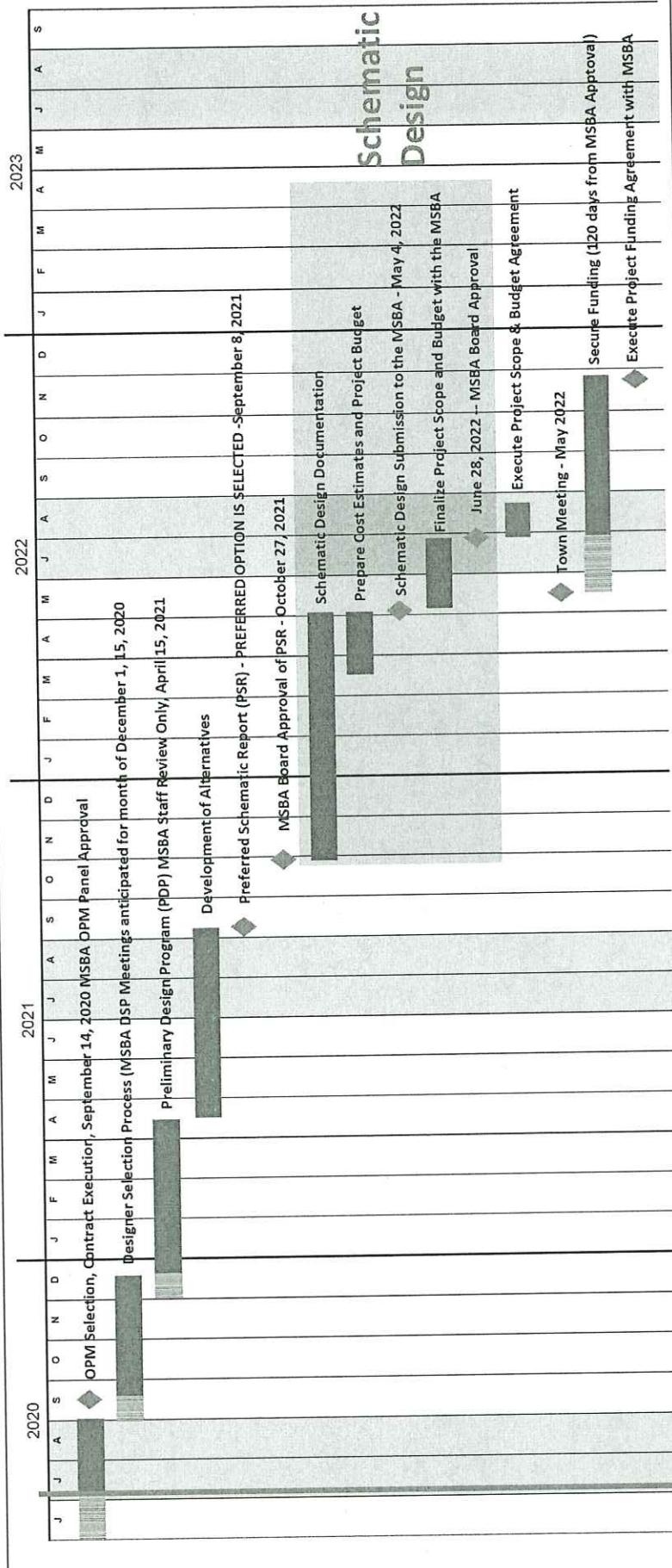
JOHN R. PIERCE SCHOOL

Feasibility and Schematic Design Schedule



JOHN R. PIERCE SCHOOL

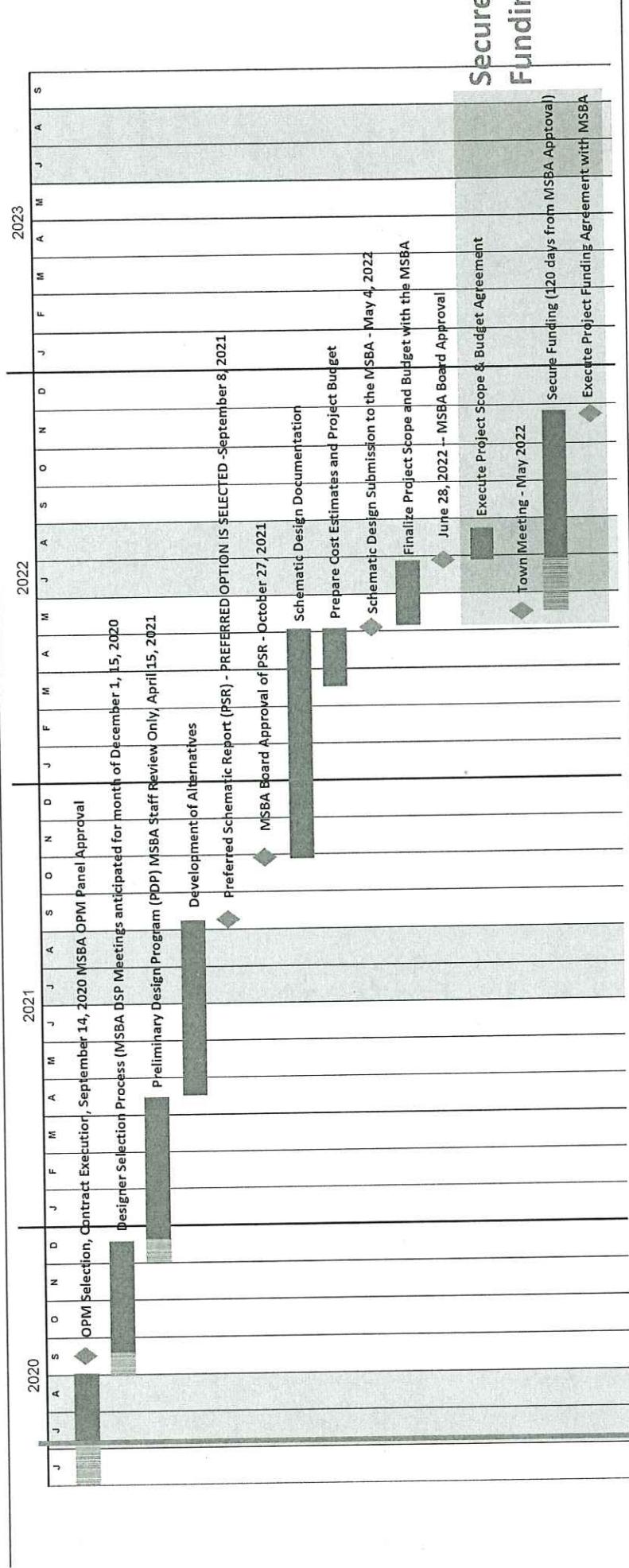
Feasibility and Schematic Design Schedule



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JOHN R. PIERCE SCHOOL

Feasibility and Schematic Design Schedule

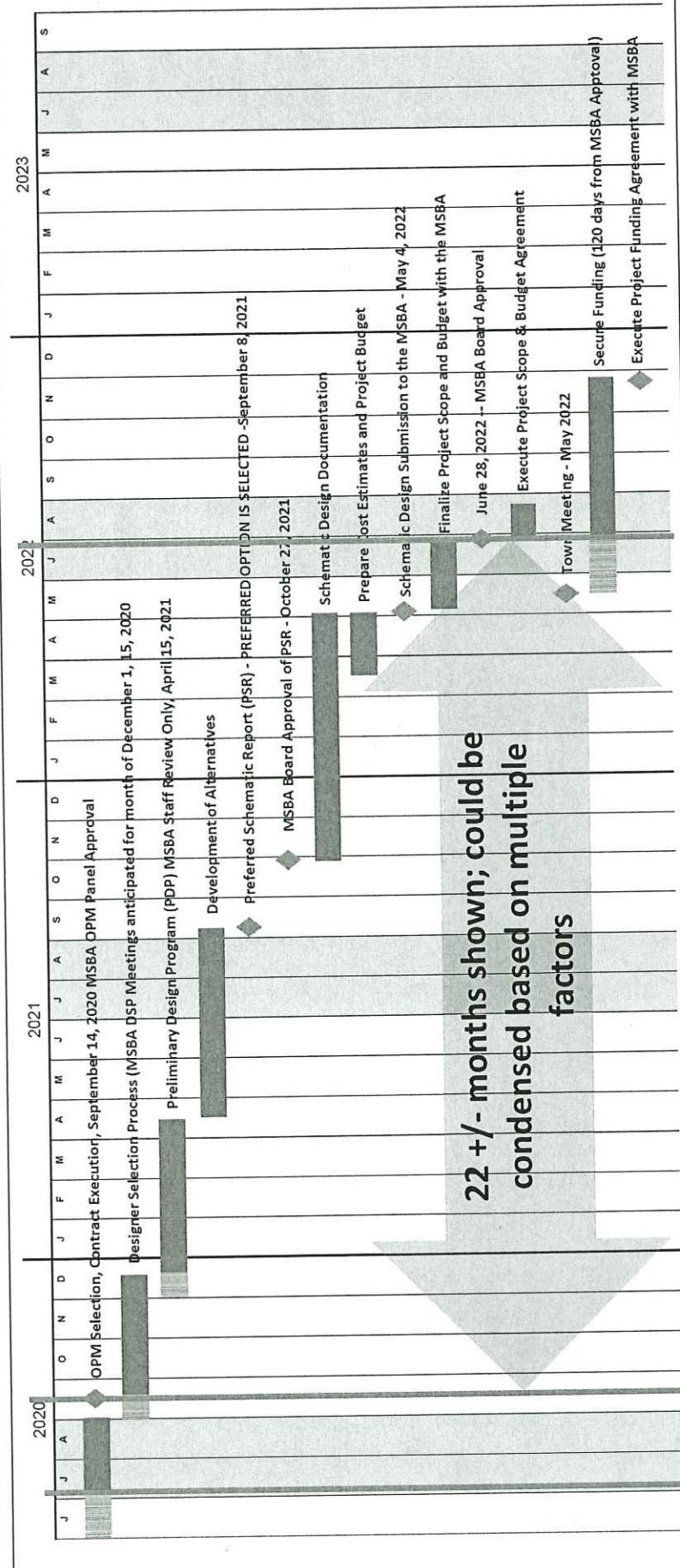


PUBLIC SCHOOLS of
BROOKLINE



JOHN R. PIERCE SCHOOL

Feasibility and Schematic Design Schedule



PUBLIC SCHOOLS of
BROOKLINE



JOHN R. PIERCE SCHOOL

Cost Comparisons per SF

Elementary Schools

Town	School	Start of Construction	Gross Square Footage	Site Cost (incl. site utilities)	Site Cost / Bldg GSF	Building Cost	Building Cost / Bldg GSF	Total Construction Cost	Construction Cost / Bldg GSF	Voter Original Total Project Cost	Total Project Cost	Total Project Cost / Bldg GSF
Brookline	Michael Driscoll Elementary School 800 students	DD	155,632	\$8,212,203	\$53	\$84,697,360	\$54	\$92,909,563	\$597	\$115,300,000	\$115,300,000	\$741
Lexington	Maria Hastings Elementary School 645 Students	Jun-18	110,000	\$9,518,724	\$87	\$43,454,694	\$395	\$52,973,418	\$482	\$65,339,418	\$594	
Taunton	James L. Mulcahey Elementary School 735 students	Jan-19	119,693	\$5,563,899	\$46	\$44,510,306	\$372	\$50,074,205	\$418	\$64,971,831	\$543	
Springfield	Brightwood Elementary School 800 students	Aug-19	150,500	\$5,940,700	\$39	\$58,169,200	\$387	\$64,109,900	\$426	\$82,201,776	\$546	
Danvers	Ivan G Smith Elementary School 465 Students	Jan-20	82,728	\$4,589,938	\$55	\$37,484,335	\$453	\$42,074,273	\$509	\$52,000,000	\$629	
Wareham	Minot Forest Elementary School 1020 students	Feb-20	159,989	\$10,507,942	\$66	\$61,558,436	\$385	\$72,056,378	\$450	\$90,474,182	\$566	
			\$7,388,901	\$58	\$54,979,055	\$423	\$62,367,956	\$480	\$19,216,667	\$78,381,201	\$603	

PUBLIC SCHOOLS of
BROOKLINE

LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT



JOHN R. PIERCE SCHOOL

Cost Comparisons per SF

Middle Schools

Town	School	Start of Construction	Gross Square Footage	Site Cost (incl. site utilities)	Site Cost / Bldg GSF	Building Cost	Building Cost / Bldg GSF	Total Construction Cost	Construction Cost / Bldg GSF	Voter Original Total Project Cost	Total Project Cost	Total Project Cost / Bldg GSF
Lynn	Pickering Middle School 652 students (LF Project)	Apr-18	131,295	\$6,854,901	\$52	\$59,838,796	\$456	\$66,693,697	\$508	\$83,661,513	\$637	
Framingham	Fuller Middle School 630 students (JLA Project)	Jun-19	136,970	\$9,782,890	\$71	\$68,152,539	\$498	\$77,935,429	\$569	\$98,276,878	\$718	
Natick	John F. Kennedy Middle School 1000 students	Mar-20	182,195	\$9,513,093	\$52	\$78,046,797	\$428	\$87,559,890	\$481	\$77,412,197	\$425	
			\$8,716,961	\$59	\$68,679,377	\$461	\$77,396,339	\$519	\$0	\$86,450,196	\$593	



JOHN R. PIERCE SCHOOL

Conceptual Budget Range Analysis

New Construction	
Enrollment	725
MSBA ISS per student (NSF)	81,200
Space beyond MSBA guidelines	15,000
Net Building Square Footage	96,200
Assumed Net to Gross factor [1.5] GSF	48,100
Total Building GSF	144,300
Cost Per Square Foot New Construction	\$597
Construction Costs	\$86,147,100
Escalation Costs (3.5% for 2 years)	\$6,030,297
Adjusted Construction Cost	\$92,177,397
Soft Costs (25% of Hard Costs)	\$23,044,349
Anticipated Total Project Cost	\$115,221,746

\$115M

New Construction	
Enrollment	725
MSBA ISS per student (NSF)	81,200
Space beyond MSBA guidelines	15,000
Net Building Square Footage	96,200
Assumed Net to Gross factor [1.5] GSF	48,100
Total Building GSF	144,300
Cost Per Square Foot New Construction	\$597
Construction Costs	\$86,147,100
Escalation Costs (3.5% for 2 years)	\$6,030,297
Adjusted Construction Cost	\$92,177,397
Soft Costs (25% of Hard Costs)	\$23,044,349
Anticipated Total Project Cost	\$108,080,700

\$108M



JOHN R. PIERCE SCHOOL

Conceptual Budget Range Analysis

Renovation	
Enrollment	725
MSBA ISS per student (NSF)	81,200
Space beyond MSBA guidelines	15,000
Net Building Square Footage	96,200
Assumed Net to Gross factor [1.5] GSF	48,100
Total Building GSF	198,000
Cost Per Square Foot Renovation	\$400
Construction Costs	\$79,200,000
Escalation Costs (3.5% for 2 years)	\$5,544,000
Adjusted Construction Cost	\$84,744,000
Soft Costs (25% of Hard Costs)	\$21,186,000
Relocation/Modular Classrooms	\$3,000,000
Anticipated Total Project Cost	\$108,930,000
Anticipated Total Project Cost	\$80,200,500

\$80M

\$109M

PUBLIC SCHOOLS of
BROOKLINE

 **LEFT FIELD**
THE RIGHT CHOICE IN PROJECT MANAGEMENT



MANAGEMENT OF PROJECT

Designer Procurement

Examples of custom reference check categories

Communication	Budget Control	Document Quality	Schedule Control	Construction Control	LeftField District Added Categories			
					Understands MSBA procedures and follows them	Listens to Client (follows directions)	Listens to OPM (follows directions)	Would you work with the firm again?
Excellent	Excellent	Excellent	Excellent	Excellent	<input checked="" type="checkbox"/> Excellent	<input checked="" type="checkbox"/> Excellent	<input checked="" type="checkbox"/> Excellent	Absolutely
	<input type="checkbox"/> Good	<input type="checkbox"/> Good	<input type="checkbox"/> Good	Yes, but reluctantly				
	<input type="checkbox"/> Poor	<input type="checkbox"/> Poor	<input type="checkbox"/> Poor	No				

Examples of RFS additions:

- Evaluation of five (5) sites that are being considered if new construction is deemed (in conjunction with the MSBA) as the preferred solution, including, at a minimum, a Phase 1 Initial Site Assessment conforming to 310 CMR 40.00 and performed by a licensed site professional.
- Consideration of alternative grade configurations (Grades 9-12 or Grades 8-12);
- CM-at-Risk Delivery Method and the ability to provide early release bidding packages for a potential fast track project that may be procured as Ch. 149A, CM-R;



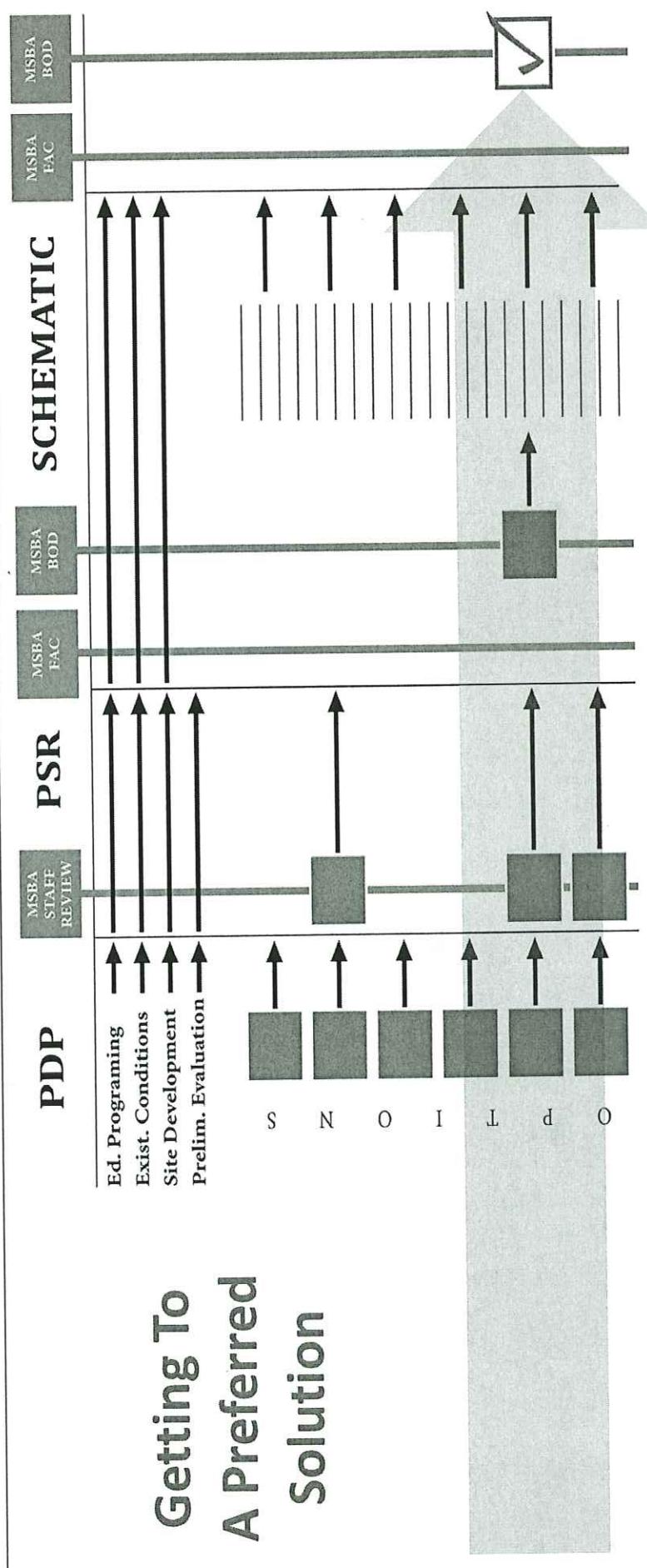
LEFTFIELD
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PUBLIC SCHOOLS of
BROOKLINE



MANAGEMENT OF PROJECT

MSBA Module Knowledge





MANAGEMENT OF PROJECT

Determining Optimum Site/Option - Qualitative Analysis

Billerica Memorial High School

EVALUATION SUMMARY, includes Casey scores in various categories

Legend	
○	0 Not preferable
●	1 Poor
○	2 Satisfactory
●	3 Advantageous
●	4 Highly Advantageous

PSR Evaluation Criteria	Option 3 Hybrid - HS	Option 4A-alt New - HS	Option 4B New - Cider
1. Delivery of the Educational program	○ 1.43	● 2.93	● 3.27
2. Responsible design (program organization, sustainability, facility maintenance, etc)	○ 1.21	● 3.43	● 3.57
3. Traffic (external to the site)	○ 1.71	○ 2.13	○ 1.60
4. Traffic (internal to the site)	○ 1.57	○ 2.33	○ 2.93
5. Impact to neighbors	○ 2.21	○ 2.47	○ 1.47
6. Achieves athletic program needs	○ 1.64	○ 2.60	○ 3.20
7. Cost effective /value	○ 0.64	○ 2.80	○ 1.60
8. Impact to educational program/facilities during construction	○ 0.43	○ 1.60	○ 3.60
9. Design flexibility	○ 0.50	○ 2.36	○ 3.36
10. Achieves parking expectations, inclusive of educational events	○ 1.50	○ 2.14	○ 2.57
11. Schedule effectiveness	○ 1.14	○ 2.21	○ 2.86
12. Cost risk	○ 0.93	○ 2.40	○ 2.33
13. Schedule risk	○ 0.86	○ 2.14	○ 3.14
14. Permitting	○ 2.14	○ 2.27	○ 2.07
15. Pedestrian access	○ 2.00	○ 2.67	○ 1.87
Totals	19.93	36.49	39.43



MANAGEMENT OF PROJECT

CM Procurement - Qualitative

MICHAEL DRISCOLL SCHOOL - Brookline, MA

Evaluation of Proposals for Construction Manager at Risk Services

	BOND Building	Consigli Construction	Gilbane	Suffolk	Walsh Brothers
General Information					
BIP Expense Form Signature	Francis X. Hayes, President Francis X. Hayes Hayes@wachobrothers.com 617-327-5600	Christian Riordan, Project Executive Christian Riordan Corda@consigli.com 508-473-2550	James Conley, Business Development Mgr James Conley jconley@gilbane.com 617-272-3335	Chris Walente, VP Operations Chris Walente CWalente@wachbrothers.com 617-327-5338	Ken White, Director of BD Ken White Ken.White@wachbrothers.com 617-327-5200
Contact Person -- Name, Email, Phone Number					
Management Personnel					
Management Personnel	PIC - Ken Johnson PD - David Capaldo PK - Chris Harting PM - Austin Carr ADM - Edward Matthews Gen. Super (Part time) - Jerry Hanmerley Asst. Super - Stefanie Crepeau	PIC - Christian Riordan PM - Christian Riordan PK - Chris Harting PM - Austin Carr ADM - Edward Matthews Gen. Super - John Laprise Superintendent - Ken Drotte MEP Mgr - Chris Hamel	PIC - Sean Edwards/Chris Walente PM - Noah Marasas PK - Ben Caravan PM - John Laprise PE - Bridget Hawke Gen. Super - George Regis Super - Patrick DeBenedetto	PIC - Frank Morse PM - Ryan Tracy PK - Erin Scottie PM - Nelson Dupuis Project/Ops - John Bietsch Super - David Smith Super - Paola O'Sullivan Asst. PM - Nicolas Carevi	PIC - Frank Morse PM - Ryan Tracy PK - Erin Scottie PM - Nelson Dupuis Project/Ops - John Bietsch Super - David Smith Super - Paola O'Sullivan Asst. PM - Nicolas Carevi
Similar Project Experience	Quincy South-West Middle School Wakefield Cahn Middle School Bristol CC Health and Science Building	Stoughton High School Holbrook Pre-K - 12 Framingham Fuller Middle School	Minuteman Regional Voc Tech HS Duxbury STEM Academy Easts North Shore Agt & Tech HS	Saugus Middle/High School Somerville High School UMass Lowell Perry Hall	Thurgood Marshall Middle School Maria Hastings Elementary School Klaman Hall, Harvard
CM at Risk Mgt L3/A	Quincy South-West Middle School John J. Segura Health and Science Building Bristol CC Health and Science Building	Stoughton High School Holbrook Pre-K - 12 Framingham Fuller Middle School	North Reading Middle/High Winthrop Middle/High Taconic High School	Somerville High School Saugus Middle/High School BMC Durfee High School	Thurgood Marshall Middle School Maria Hastings Elementary School
Massachusetts Public K-12 Construction	Quincy South-West Middle School Wakefield Cahn Middle School	Stoughton High School Holbrook Pre-K - 12 Framingham Fuller Middle School	Minuteman Regional Voc Tech HS Wilmington High School	Somers Middle/High School BMC Durfee High School	Maria Hastings Elementary School
Experience with K-12 Projects	Yes	Yes	Yes	Yes	Yes
Project Over \$50M (in M)	Yes	Yes	Yes	Yes	Yes
Identification of the Project Team Members with specific information on key project personnel strengths, Project organization chart showing communication amongst team members, the school and the Wakefield Permanent Building Committee.	PD - David Capaldo PK - Chris Harting PM - Austin Carr ADM - Edward Matthews Gen. Super (Part time) - Mike Donohue Asst. Super - Jerry Hanmerley Asst. Super - Stefanie Crepeau	PM - Adam Gordon PK - Kevin Coyle PM - Kevin Coyle ADM - Robert Briggs Gen. Super - John Laprise Superintendent - Ken Drotte MEP Mgr - Chris Hamel	Sc. PK - Walter Kirchard Lead PM - Lyndell Callahan Project PM - Kevin Coyle Gen. Super - Robert Briggs Super - Derek Ultman Asst. Super - Alex Pard	PK - Noah Marasas PM - Ben Caravan ADM - Julia Moller PE - Bridget Hawke Gen. Super - George Regis Super - Patrick DeBenedetto	PK - Frank Morse PM - Ryan Tracy PK - Erin Scottie PM - Nelson Dupuis Project/Ops - John Bietsch Super - David Smith Super - Paola O'Sullivan Asst. PM - Nicolas Carevi

PUBLIC SCHOOLS of
BROOKLINE

LEFT FIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT





MANAGEMENT OF PROJECT

CM Procurement - Qualitative

MICHAEL DRISCOLL SCHOOL - Brookline, MA

Evaluation of Proposals for Construction Manager at-Risk Services

Detailed Project Approach during the Pre-Construction Phase: Identifying challenges and proposed solutions.	HA	HA	HA	HA	HA	A	HA
Construction Management Plan: Approach to control cost, schedule, quality, documents and claims.	HA	HA	HA	HA	A	A	HA
Identification of the Project and Phasing Challenges addressing safety of staff and students, access for trades and materials.	HA	A	HA	HA	HA	HA	HA
Effective Value Engineering and Quality Control Programs	A	A	A	A	A	A	A
Maintained Construction Progress Schedules	HA	HA	HA	HA	HA	HA	HA
Controlled and Reduced Change Order Costs	A	A	A	A	A	A	HA
Effective Project Safety Programs	A	A	HA	HA	A	A	A
Excellent Coordination and Management of Trade Contractors/Subcontractors	A	A	HA	HA	HA	HA	HA
Cooperation and Coordination with the Owner	HA	HA	HA	HA	HA	HA	HA
Minimizing of Claims and Disputes.	A	A	A	A	A	A	A
Overall Technical Proposal	2	4	1	5	5	3	3
Overall Technical Evaluation Ranking							
Reference Check	HA	A	HA	NA	NA	HA	HA
Overall References							
Price Proposal	\$188,250	\$235,866	\$180,000	\$272,707	\$134,224		
Preconstruction Fee	\$2,025,000	\$1,978,000	\$2,070,000	\$1,800,000	\$2,000,000		
CM Overhead and Profit	\$7,281,326	\$6,949,073	\$7,355,981	\$9,716,020	\$5,158,329		
Total CM General Conditions	\$9,494,576	\$9,162,339	\$9,585,981	\$11,788,727	\$7,202,553		
Total Estimated CM Costs							
Overall Price Proposal	3	2	4	5	1		
Price Proposal Ranking							
Overall Proposal	3	4	1	5	2		
Overall Ranking							

PUBLIC SCHOOLS of
BOOKLINE

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MANAGEMENT OF PROJECT

CM Procurement - Quantitative

Brookline - Michael Driscoll School - CM at RISK Price Comparison (for Proposed Baseline (RFP) Schedule)					
The Overhead/Profit and Pre-Construction Fees are the best basis for apples to apples cost comparison.					
LINE ITEM	Bond	Consigli	Gilbane	Suffolk	Walsh
The Overhead and Profit cannot be negotiated.					
Overhead & Profit	\$ 2,025,000	\$ 1,978,000	\$ 2,070,000	\$ 1,800,000	\$ 2,000,000
Total Pre-Construction Fee	\$ 188,250	\$ 235,866	\$ 180,000	\$ 272,707	\$ 134,224
DO Pre-Construction Fee	\$ 188,250	\$ 235,866	\$ 180,000	\$ 272,707	\$ 134,224.00
DO Pre-Construction Duration (months)	10	12	8	8	13
DO Pre-Construction Monthly Fee	\$ 18,825	\$ 19,855.50	\$ 22,500	\$ 34,088	\$ 10,324.92
Total Fees (O&P+ Pre-Con)	\$ 2,213,250	\$ 2,213,866	\$ 2,250,000	\$ 2,072,707	\$ 2,134,224
The Costs below are estimates and can be negotiated/adjusted based on Schedule Duration, Staffing, Construction Cost and Project Requirements.					
Bonds	\$ 684,750	\$ 552,000	\$ 601,680	\$ 752,257	\$ 644,000
Insurance	\$ 1,047,000	\$ 1,279,950	\$ 892,030	\$ 1,098,093	\$ 490,400
General Liability	\$ 910,000	\$ 1,104,000	\$ 765,800	\$ 920,000	\$ 340,400
Builder's Risk	\$ 137,000	\$ 175,850	\$ 98,230	\$ 178,063	\$ 150,000
Total Insurance + Bonds	\$ 1,731,750	\$ 1,831,350	\$ 1,433,710	\$ 1,850,350	\$ 1,134,400
General Conditions (excluding staffing)	\$ 1,312,760	\$ 576,904	\$ 1,600,560	\$ 2,558,799	\$ 381,100
Total CM Staffing Costs	\$ 4,236,796	\$ 4,540,219	\$ 4,241,711	\$ 5,266,871	\$ 2,971,229
Total General Conditions	\$ 5,549,576	\$ 5,117,123	\$ 5,842,274	\$ 7,865,1570	\$ 3,352,329
Total Estimated CM Cost	\$ 9,494,576	\$ 9,162,940	\$ 9,585,981	\$ 11,788,727	\$ 6,620,953
Total Estimated CM Cost can vary based on the items that the CM includes in the estimated General Conditions. At the time of the GMP, additional items could be added to or eliminated from the total project cost. Note on the Detail Sheet, items listed as Cost of Work will be included in the GMP costs.					

PUBLIC SCHOOLS of
BOOKLINE



MANAGEMENT OF PROJECT

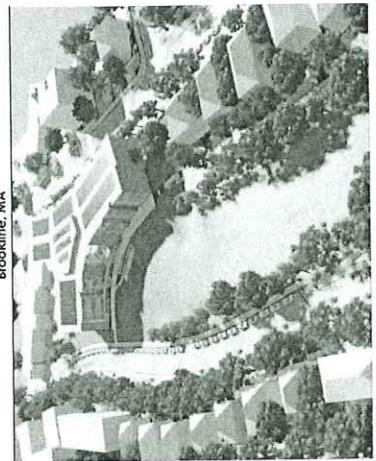
Monthly Report - Design

LEFTFIELD

The Right Choice in Project Management

MICHAEL DRISCOLL SCHOOL

Brookline, MA



OPM Monthly Project Update Report

March 2020

	FS	SD	DD	CD	BIDDING	CONSTRUCTION	CLOSEOUT	SITE
1. Site Preparation	Start	End	Start	End	Start	End	Start	End
2. Construction	Start	End	Start	End	Start	End	Start	End

PUBLIC SCHOOLS of
BOOKLINE

Page 1 of 2

LEFTFIELD						DISC School Project - Brookline, MA		
Meeting Schedule Status						March		
Weekday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Holiday
Start TD	Start	End	Start	End	Start	End	Start	End
1. Site Preparation	Start	End	Start	End	Start	End	Start	End
2. Construction	Start	End	Start	End	Start	End	Start	End
3. Closeout	Start	End	Start	End	Start	End	Start	End

LEFTFIELD						PROJECT ACTIVITY LOG		
Michael Driscoll School Project - Brookline, MA						March		
Weekday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Holiday
1. Site Preparation	Start	End	Start	End	Start	End	Start	End
2. Construction	Start	End	Start	End	Start	End	Start	End
3. Closeout	Start	End	Start	End	Start	End	Start	End



MANAGEMENT OF PROJECT

Monthly Report - Construction

LEFT FIELD

B.M.C. DURFEE HIGH SCHOOL
Fall River, MA

ORM Monthly Project Update Report
May 2020

FS/SD	DO	CD	BIDDING	CONSTRUCTION	CLOSEOUT
4	4	4	4	4	4

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LEFT FIELD

B.M.C. DURFEE HIGH SCHOOL
Fall River, MA

CONSTRUCTION PHOTOS

MAY 2020

Front of school view from Elmwood Street

Slab concrete placement nearing completion

North courtyard masonry & Zone A/A roofing

South courtyard brick decorative stone windows

HVAC equipment units Zone 'B'

Rubber installation for swimming pool meeting completion

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LEFT FIELD

B.M.C. DURFEE HIGH SCHOOL
Fall River, MA

CONSTRUCTION PHOTOS

MAY 2020

Front of school view from Elmwood Street

Slab concrete placement nearing completion

North courtyard masonry & Zone A/A roofing

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PUBLIC SCHOOLS of
BOOKLINE

LEFT FIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT



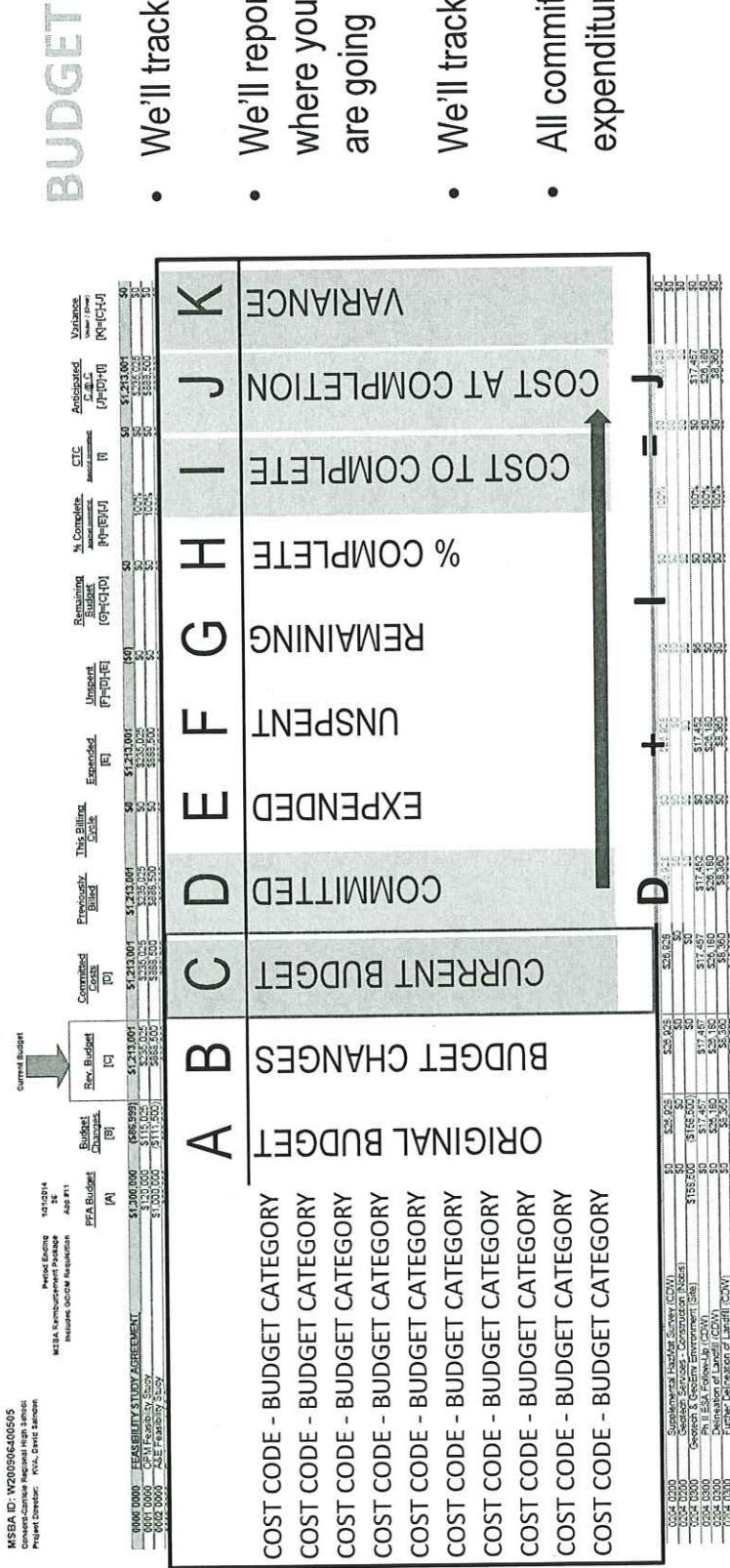
MANAGEMENT OF PROJECT

Budget and Pro-Pay Management

MSB# ID: W205060540505
Contractor/Customer: Project Head 3 Inc.
Project Director: Mr. David Sanchez

W.E.B. Estimate Date: Period Ending
Revised On Date: Acquisition

Period Ending Revised On Date: Acquisition	1/2/2014 4/21/11	Current Budget								
PFA Budget	Budget Status	Competed Costs [D]	Precious Budget Blown [E]	This Billing Outstanding [F]	Extended Remaining Budget [G]	Unspent Remaining Budget [H]	% Complete Remaining Budget [I]	Remaining Budget [J]	Anticipated Completion Date [K]	Variance Remaining Budget [L]
00060000 FEASIBILITY STUDY AGREEMENT	\$1,000,000 (\$86,999)	\$1,213,001	\$1,213,001	\$0	\$1,213,001	\$0	100%	\$0	\$1,213,001	\$0
00010000 City Ford Body Shop	\$1,000,000 (\$15,025)	\$1,185,975	\$1,185,975	\$0	\$1,185,975	\$0	100%	\$0	\$1,185,975	\$0
00020000 A/E Fasching LLC	\$1,000,000 (\$11,500)	\$882,500	\$882,500	\$0	\$882,500	\$0	100%	\$0	\$882,500	\$0



PUBLIC SCHOOLS of
BOOKLINE

LEFT FIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT



MANAGEMENT OF PROJECT

Management of Two Budgets (TPB and District Share)

		Remaining Budget		% Complete		Anticipated CTC		Variance		Ineligible	
		Unspent [F]=[D]-[E]		Estimated Total [H]=[E]+[D]		Actual CTC [I]=[D]+[U]		Wanted CTC [J]=[D]-[C]		Definite [K]=[J]-[C]	
		\$46,776,197		\$12,098,879		\$0	\$7,549,319	\$173,199,715	(\$2,897,574)	\$43,950,873	\$3,855,741
											\$47,806,614

REIMBURSABLE DASHBOARD 

Anticipated C @ C	\$173,199,715
Anticipated Ineligibles	\$47,806,614
Est. basis of total grant	\$125,393,101
Reim rate	56.99%
Est. max. grant	\$71,461,528
Est. District share (spending 100% of all contingencies)	\$101,738,187
Adjusted Est. District share (\$2m feasibility study value removed)	\$99,738,187
Original District Share Goal	\$100,000,000
Delta	(\$261,813)

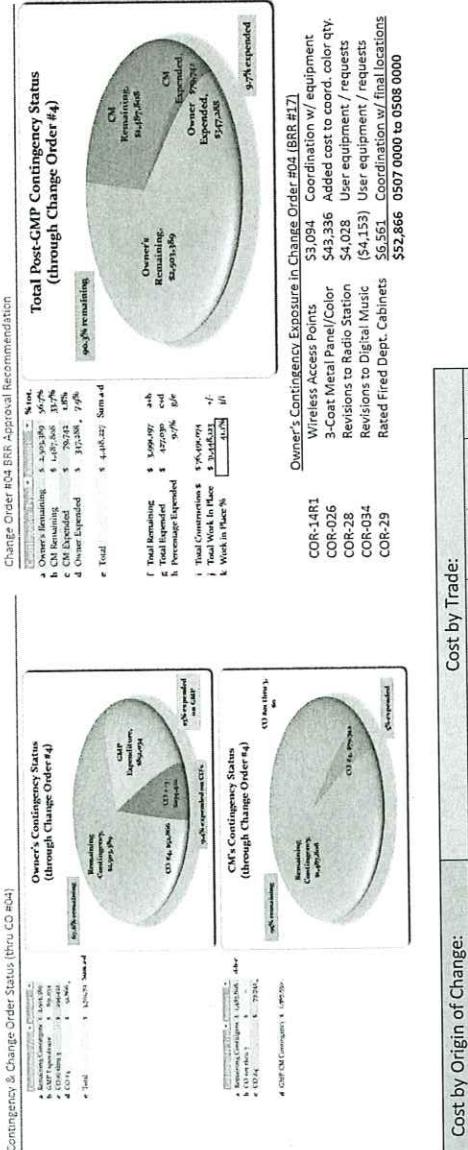


MANAGEMENT OF PROJECT Change Event Tracking

CHANGE MANAGEMENT

CLIENT COMMUNICATION, REVIEW AND APPROVAL TOOLS; HIGH LEVEL TO DETAIL COMMUNICATION AND PRESENTATION SKILLS

DETAILED TRACKING OF CHANGE ORDERS TO CATEGORIZE CHANGE ORDER COSTS BY ORIGIN, LOCATION AND TRADE



Cost by Trade:					
Cost by Origin of Change:					
Net Deducted	Net Added	Ineligible	Eligible	Cost by Location:	Cost by Origin of Change:
Demolition / Abatement	Site	Building	Site	Structural	New Scope by AHJ
Design Issue	New Scope by Owner	New Scope by AHJ	New Scope by AHJ	Site	Utilities
Abatement / Demolition	Site	Building	Eligible	Plumbing	Electrical
Design	New Scope by Owner	New Scope by AHJ	New Scope by AHJ	Utilities	HVAC
Demolition / Abatement	Site	Building	Eligible	Plumbing	Misc.
\$2,000	\$10,000	\$2,000	\$10,000	\$10,000	\$1,500
Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description
1. 002	1. 003	1. 005	1. 006	1. 007	1. 007
Change Order 1	Change Order 1	Change Order 1	Change Order 1	Change Order 1	Change Order 1
\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description
1. 002	1. 003	1. 005	1. 006	1. 007	1. 007
Change Order 2	Change Order 2	Change Order 2	Change Order 2	Change Order 2	Change Order 2
\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000
Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description	Issue/Event Description
2. 002	2. 004	2. 008	2. 008	2. 008	2. 008

PUBLIC SCHOOLS of
BROOKLINE

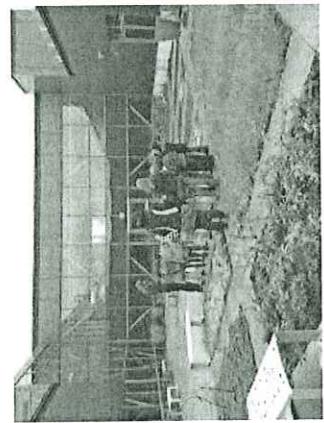
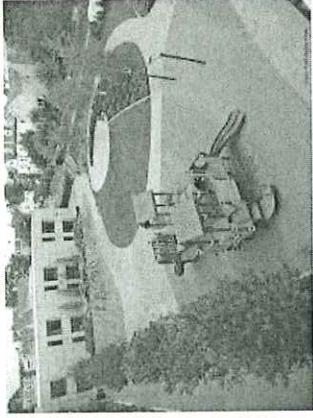
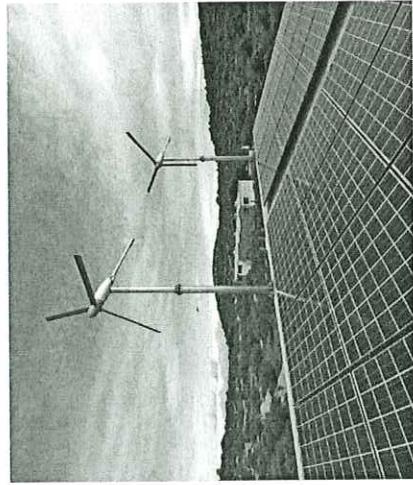
LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT



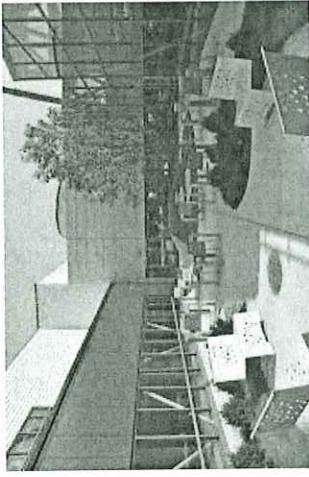
SUSTAINABILITY

Experience

- Lynn Stapleton and Carlos Montanez are both LEED certified
- 17 LEED projects over the past 5 years – with almost all being LEED Gold. Billerica – 1st in State for LEEDv4 Silver Certification.
- Managed the \$75M Stem Cell and Regenerative Biology project at Harvard University which had the distinction of having the most LEED points of any project nationally as a LEED Platinum project.
- We have participated in many sustainable initiatives, including: PV, Solar Thermal, Mini Wind Turbines and Geothermal wells.
- We believe an appropriate approach with the proper utilization of building controls can be a path to both solid preventative maintenance practices as well as significant energy savings.
- Hired by Eversource as a part of their Onsite Facility Operator Training Program. We are the only OPM firm in the State to hold this distinction.



Lighting of exterior courtyards and playgrounds for security purposes

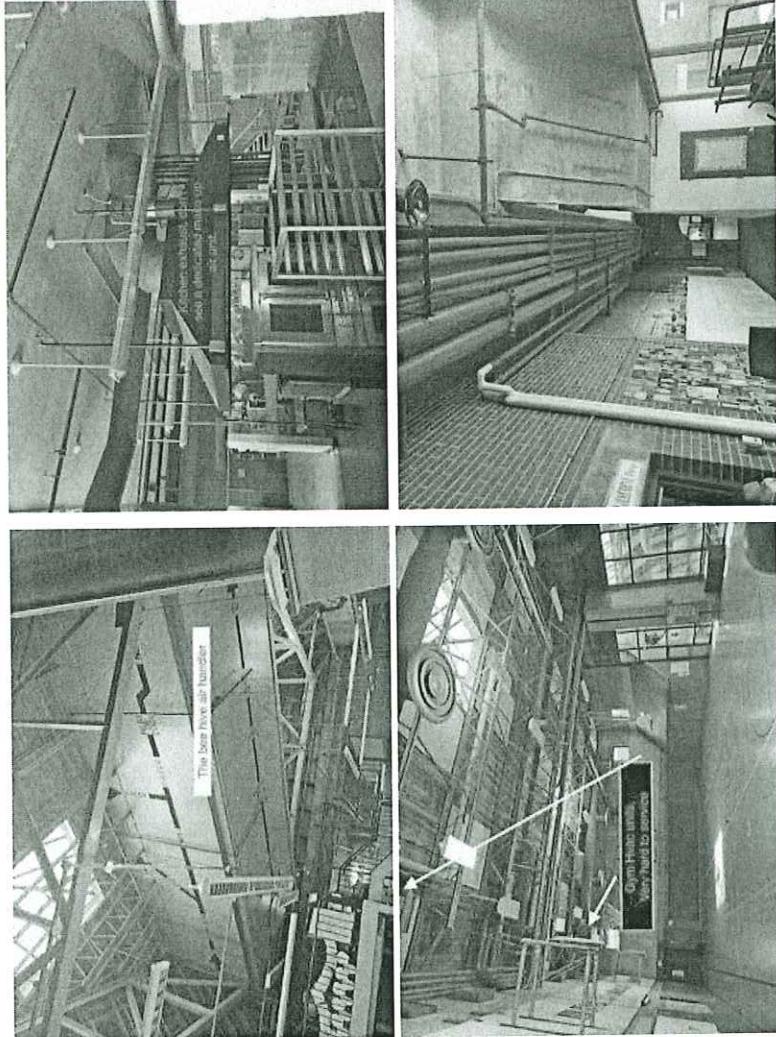


PUBLIC SCHOOLS of
BROOKLINE

MEP & COMMISSIONING KNOWLEDGE

In-House MEP Expertise & Commissioning

LEEFFIELD has the in-house MEP expertise from both a construction and operational perspective that will help the Owner specify efficient, yet simple to operate and maintain, equipment that will allow the Owner to manage the systems in a manner that will maximize their useful life.



PUBLIC SCHOOLS of
BROOKLINE

LEEFFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

PUBLIC OUTREACH

Outreach and Social Media Presence



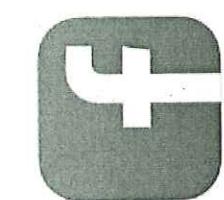
Durfee Rising
@DurfeeRising

Home Posts About

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@DurfeeRising
#BuildingForTheFuture



Local Cable News
Local Talk Radio



Local Talk Radio

PUBLIC SCHOOLS of
BROOKLINE

LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT



MSBA SYSTEMS & AUDIT

Experience and Success

- LEFTFIELD has 100% MSBA report rating over the last 5 years
- LEFTFIELD manages Pro-Pay on behalf of most of our Districts
- The MSBA recommends that LEFTFIELD work in Pro-Pay on behalf of Districts
- When LEFTFIELD manages Pro-Pay, projects close out timely and efficiently
- LEFTFIELD has successfully managed the 10-month enhanced commissioning phase with little to no issues remaining



LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

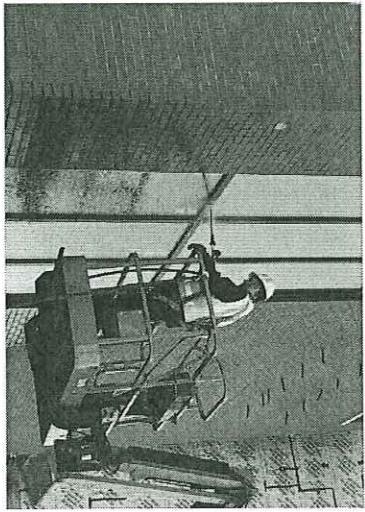
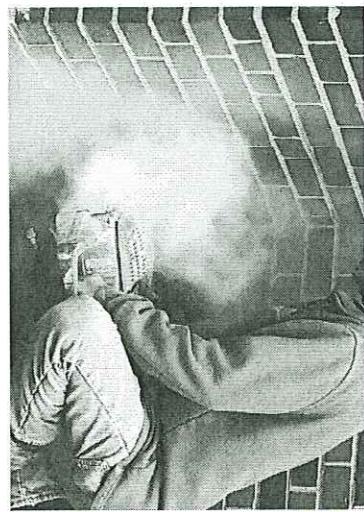
PUBLIC SCHOOLS of
BROOKLINE



Q & A

Project Management

- Designer and contractor procurement
 - (including MBE/WBE)
- Management of designer and contractor after procurement
- Experience with MSBA systems
 - Regular ProPay submissions and monthly reports
 - Follow the rules
 - Keep them informed
 - Successful audit



Energy Management and Commissioning

- Cost Effective Zero Net Energy (ZNE) Design
- Alternatives for Commissioning (Cx)
 - Measurement & Verification (M&V)
 - Continuous Commissioning and Monitoring Based Commissioning (MBCx)
 - Fault Detection and Diagnostics (FDD) Tools
- Partnership with the Town of Brookline
 - Training, Operations & Maintenance, Troubleshooting, and Energy Analysis
- Project Execution
 - Design, Bidding, Construction, Acceptance, Project Closeout, and Post Occupancy
 - Leadership in Energy and Environmental Design (LEED) and Collaborative for High Performance Schools (CHPS) Certification



Project & Construction Schedule



Clear and concise logic is incorporated into each schedule accounting for phasing and project resources



Critical paths and project milestones are assessed utilizing Primavera P6

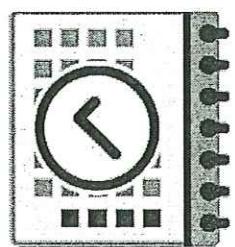
Our team will create, update, and monitor both an overall Project Schedule and a Construction Schedule, and establish accountability for each milestone and task to make certain that all project objectives and deliverables are met. Our in-house certified P6 Scheduler and is available to provide comprehensive scheduling review for the project.



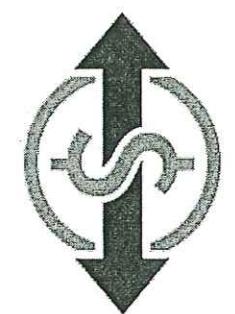
Approach to Controlling Cost, Driving Schedule, and Mitigating Risk



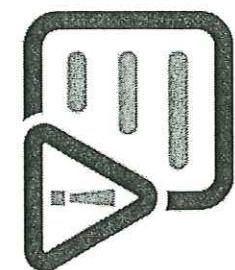
Consistent Monitoring



Monthly Review



Anticipated Expenses
Vs. Costs Incurred

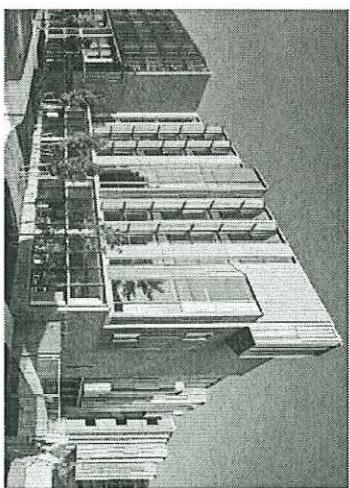
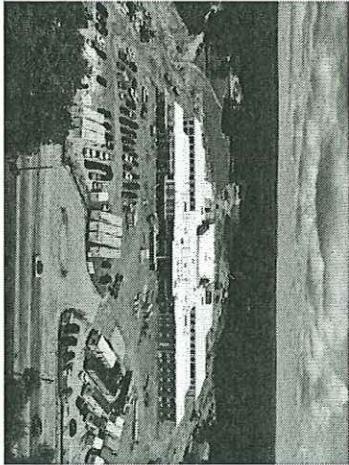


Impact on
Contingency

We will establish, update, and maintain a comprehensive project budget that details both construction costs and soft costs to give the Project Team a full understanding of the total cost of the project. We will also provide updated Cash Flow reports on a monthly basis.

CHW

Project Interest and Challenges



- Interest
 - We specialize in high quality school construction
 - Richard Marks a long term Brookline resident
 - Project poses tremendous design challenges and opportunities
 - This is what we do!

- Challenges

- Find a great architect for this challenging site and program
- Keep the project on budget
- Have a strong public process during the pandemic
- Continue Brookline's legacy of great public buildings
- Work successfully with MSBA, have a real partnership
- Work with abutting users, minimize disruption to Library, Town Hall, Police and Public Health plus pedestrians and retailers
- High quality construction!



Introductions

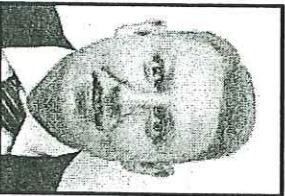
Richard Marks
Project Director

- 35 Years Experience
- Both of his children attended Brookline Schools for 13 years.



Tieshia Walton
Assistant Project Manager

- 15 Years Experience



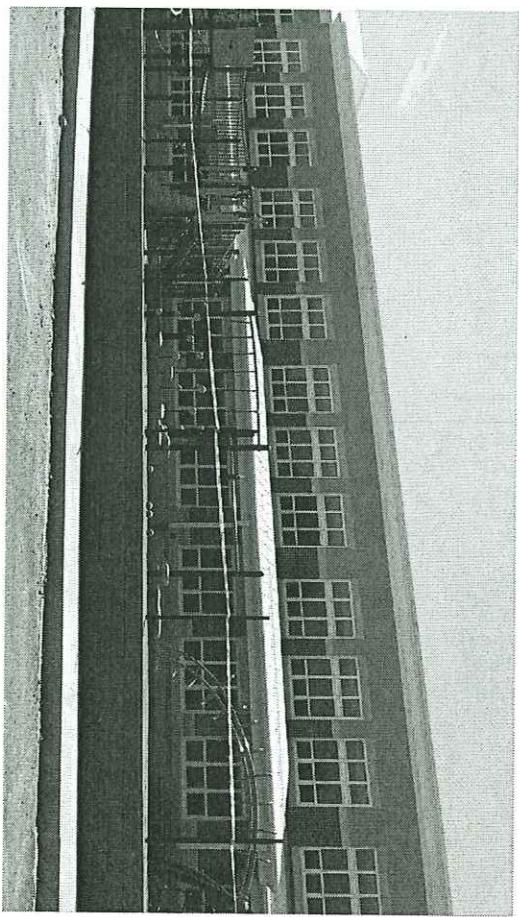
Derek Richardson
Certified Energy Manager and
Commissioning Specialist

- 7 Years Experience

CHW

Agenda

- Introductions
- Similar Projects
- Project Interest and Challenges
- Management of Project
- Experience with MSBA Systems
- Q&A



CIW

CMW

1

John R. Pierce School, Brookline, MA

July 8, 2020

